Catalogue and Index

**Periodical of the Metadata & Discovery Group,
a Special Interest Group of CILIP, the Library and Information Association**

Editorial   September 2020, Issue 200

Welcome to the 200th edition of Catalogue and Index!

This seemed like a significant number to reach and worthy of celebration, especially since the 50th anniversary of CIG itself slipped by mostly unnoticed a few years ago. C&I has been published since 1966 and has been a witness to many momentous events in the world of metadata over the years. To this end, we thought this issue should adopt an historical slant as its theme and so we have invited past editors of C&I and past chairs of CIG (now MDG) to offer their views from their time in tenure. They appear in the pages in chronological order (editors first, then chairs), although not everyone was able to contribute we manage to reach back and cover approximately 15 years, although some of these people were involved with CIG before that. One thing I noticed is that many people were first invited to join the committee with a subtle tap on the shoulder at one event or another, and I have to admit my own invitation was somewhat similar. Having an online conference this year due to Covid 19 means we weren't able to stealth recruit new committee members, so I'd like to take this opportunity to remind you all that we are very happy for people to volunteer to join us and hope you will consider it! As you will learn from reading many of the accounts in these pages being on the committee is rewarding both personally and professionally and you will find yourself an active part of the central web of metadata management within the UK.

Alongside the editors and chairs we also include Neil Nicholson who was the review editor for C&I for many years, but who has also played his part in documenting the history of cataloguing and metadata within Britain as he has contributed the 'Cataloguing' chapter to several editions of J. H. Bowman's 'British librarianship and information work'.

We also have an interview with Lesley Whyte, the Managing Director of BDS, which provides a fascinating insight into her career and how the company came about.

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CILIP SPECIAL INTEREST GROUP

OPEN ACCESS

Starting the issue off however is my own foray into the pages of C&I. MDG's back catalogue of issues is currently residing with me and so I was able to reach back into the 1960s to discover how it all started. I hope you will find my journey through the decades of C&I interesting, as I highlight various articles or issues discussed over the years. I was intrigued at how the journal has changed structure over the years, depending on editors, and material, and input from readers.

All these pieces will hopefully give you a glimpse into the history of cataloguing and metadata management in the UK, and the people involved.

But we are not just looking back into the past in this issue, we also want to look forward (to the next 200 issues?). We feature 4 of the collaborative groups currently operating within the country. Over the last few years regional networks of cataloguers have been forming. Although it is something that the MDG committee was interested in seeing happen, these collaborations have formed organically as a result of external circumstances, or with the aim of emulating the best practices of others. These groups are finding benefits in support, training, and projects and are perhaps the natural next steps for cataloguers who have found their departments shrinking over recent decades. There is strength in numbers, and since some people may no longer have many metadata colleagues within their own institutions, being part of a collaborative network can provide mental, emotional and physical support when needed. If there isn't a regional group in your area perhaps you might like to form one?

Another feature of our looking forward section is a research paper from Nigeria examining the challenges associated with performance appraisal systems used to assess cataloguers.

We hope you enjoy this issue and would love to receive feedback from our readers (for any of our issues!). The December issue will feature papers given at our recent online conference, but do look out next year for our regular calls for papers, and do consider contributing your own thoughts, reports and projects to our journal.


Karen F. Pierce, co-editor: PierceKF@Cardiff.ac.uk

We'll be aiming to feature further collaborative metadata groups in future issues – if you're a member of such a group that hasn't been covered, or if this issue inspires you to create a new one, then please don't hesitate to get in touch with us, and we can help you share your story.

Philip Keates, co-editor: p.keates@kingston.ac.uk

I hope you will be happy to take a walk with me through past issues of *Catalogue & Index*. I have attempted to highlight points of interest, and articles and themes that leapt out at me. I could have picked something from every single issue, and although it may look like that I did, I can say I had to skip over a lot of interesting material. Anyone who wants to take a look at these issues themselves can, I believe, access them at UCL (though you would need to check with them). We have long term plans to digitise past issues ourselves but as yet there is no timeframe for this.

1960s
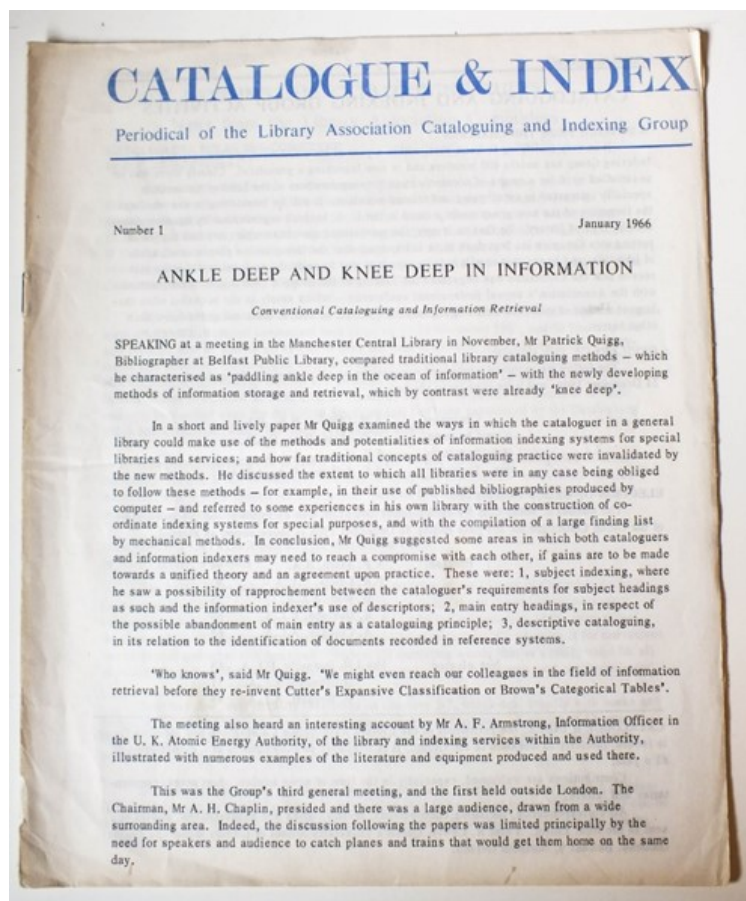
The first issue of C&I was published in January 1966 a year after the Cataloguing and Indexing Group (CIG) was founded. In a message from the Chairman – A. H. Chaplin – it was noted that:

"*It will be interesting to see whether the formation of the new group marks a trend in the L. A.* [Library Association] *towards organisation by function rather than by type of library. Be that as it may, the provisional committee which has had the job of putting this Group on its feet does think it important that the Group unites people in all kinds of libraries, and hopes that it will help in a modest way to unify the profession. It is for this reason that the Committee has suggested the holding of the Group's 1966 a.g.m. in conjunction with the Association's annual professional conference – which surely is the occasion when the largest number of members with varying interests should be able to meet and get to know each other better.*" (C&I 1: 2)

Today CILIP has a range of special interest groups, many of which are aligned by type of library but there are several in addition to MDG that unite people across libraries and sectors. The Cataloguing and Indexing Group obviously started life with positive and unifying goals which they have continued with over the years.

This first issue was edited by Peter R. Lewis who worked at Queen's University School of Library Studies in Belfast. He was the solo editor for the first 17 issues, and then became Consultant editor for a further 11. These first issues look quite different to the way *C&I* is currently; where we now have specifically themed issues, then it was mostly about sharing information with members via brief notices, meeting reports and reviews. One feature was the 'Information Clearing House' (subsequently renamed 'Open Entry') covering research activities, comparative practice and co-operative action.

A couple of things that jumped out at me from this first issue. Firstly, under a report from the LA Cataloguing Rules Sub-Committee, it was noted that "*The American edition of what it has been agreed shall be called the ANGLO-AMERICAN CATALOGUING RULES will probably be published in the summer of 1966.*" (C&I 1: 3) Since we are now 10 years into AACR2's successor, RDA, it is perhaps useful to remember it is not that long ago really that these rules were being formulated.

Secondly, I enjoyed reading that following a British Standard Specification for orthodox typewriter keyboards, the Group were "…*looking into the question of promoting a supplementary Standard for the keyboards of typewriters used in cataloguing and bibliographical work. Such a standard would recommend an optimum provision and lay-out of additional keys – such as square brackets and diacritical marks – essential for compliance with codes of cataloguing and bibliographical practice*…" (C&I 1: 4). I know there will be readers out there who do remember working on typewriters, but not me (at least not for cataloguing purposes); this piece reminded me of how far we have come in 50 years, and of how there are always aspects of our roles that we move on from.

In issue 2 technology was proving to have exciting possibilities with the Library of Congress *"…preparing to distribute cataloguing data in machine readable form (i.e. on magnetic tape or punched cards)…*" and the British National Bibliography *"…obtained the assistance of Aslib in examining the feasibility of a computer program, as a preliminary to a full-scale project for the production and distribution of BNB entries by computer.*" (C&I 2: 1). Aslib was also planning a conference for a select audience of public librarians who were making use of computers, whilst the New York Public Library had received a grant to investigate *"…the handling of catalogue information by non-conventional methods…The investigation will include a study of computer techniques for the production of cards and/or book catalogues, or for visual display on television screens.*" (C&I 2: 4). Meanwhile Alan Jeffreys, who was treasurer at the time, was advocating for more complete biographical details to be included in books by publishers. A proposed standard code of practice had been submitted by the Library Association Research Committee to the British Standards Institution in 1964.

In issue 3 concern was being expressed about some of the limitations of the current computer programs. Perhaps strangely to us it was noted that "*Although in theory computer catalogue entries can be as full as required, in practice the pressures of space, time and labour costs mean that they have to be abbreviated.*" (C&I 3: 1) Character allocations mentioned seemed crazily limiting and were leading to eccentric practices and abridgements with the suggestion that *"…it demands the skill of better-than-average cataloguers who, paradoxically, can at best produce only a worse-than-average catalogue.*" (C&I 2.1) Concern was also raised at the possibility of the reduction in cataloguing personnel due to computer cataloguing – a recurrent worry in library services that technology will mean fewer staff.

Issue 3 also announced a new classification system for Law books by Elizabeth Moys, a scheme which was originally developed for the University of Lagos. At the time of the piece in C&I (July 1966) the scheme wasn't yet published, though hoping to be so, and was being used by two libraries in Nigeria and one in England.

A history of the British Museum General Catalogue was given in issue 5 by Peter Brown. I cheered on the Trustees of the Museum who *"…decided in 1836 on the printing of a new alphabetical catalogue – in spite of the opinion of the Principal Librarian that readers should depend on the librarians' memories for new accessions."* (C&I 5: 1) How many institutional decisions and memories have disappeared with staff who have left? Issue 5 also gave notification that a 'Standard numbering' of book titles was in progress to being adopted by the UK book trade, providing a unique identifier.
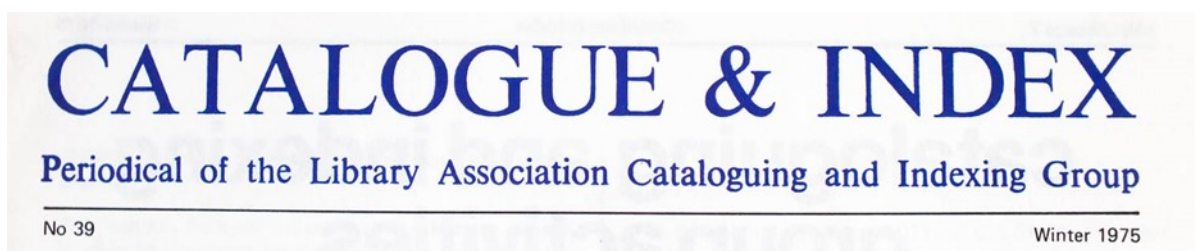
April 1967 (issue 6) announced the publication of the *Anglo-American Cataloguing Rules* (North American Text) after 35 years of preparatory work. The British version with variations was due to follow soon after. There was also notification of a lack of staff in the British National Bibliography Cumulations Section with posts available. "*The work is particularly suitable for married women ex-librarians keen to support the family income…9s. per hour.*" (C&I 6: 6). You wouldn't see that in a job advert today!

An index of articles was produced to cover C&I 1966/67.

January 1968 (no. 9) saw the publication of the *Anglo-American Rules Special Issue*, with a statement from BNB, a decision flow diagram of the new rules, points of departure, additions and changes in the new code, and an announcement of a residential seminar on the rules to be held in Nottingham. The colour of the header of this issue was red, marking a departure from all previous issues which had been blue. The red header remained for the next couple of years.

In issue 10 the main article featured discussions from a meeting about the S.B.N. (Standard Book Number) It is quite strange from 50 years in the future to look back at the introduction to something that is very standard now, and to read about anxieties and fears regarding it. One person commented: "*How many people are going to dial SBNs when trying to phone the publishers, and order telephone numbers from their booksellers?*" They go on to say: "*I cannot see that this kind of numbering can ever be of use to libraries…*" (C&I 10: 12)

The archive is missing the final issue of the 1960s but the previous number (15) in July 1969 was looking forward to the publication of Dewey 18, there having been some disquiet about Dewey 17 discussed two years previously.

CATALOGUE & INDEX

Periodical of the Library Association Cataloguing and Indexing Group

No 39   Winter 1975

1970s

The 1970s heralded a new editor in the form of Michael Gorman, with Peter Lewis remaining as a consultant editor for a couple of years, and P. J. Quigg joining the editorial board, until 1973 when Russell Sweeney took over as sole editor until 1980.

Issue 17 discussed a time lapse camera project at the Newcastle upon Tyne University Library which filmed the use of the card catalogue. *"Few people apparently noticed that they were being filmed and no one objected."* (C&I 17: 10)

The front page article of issue 20 (Oct 1970) featured a proposed change in filing order for the Post Office directory; delight was expressed that a topic ('filing') normally considered the remit of librarians had become a national news item.

Dewey 18 was once again a hot topic in issue 21 (Jan 1971) with both the BNB and Library of Congress adopting the new schedule from the start of the year despite it not being due for publication for another six months. Libraries were going to face a dilemma between accepting the DDC18 classmarks on their new stock when using BNB data, but unable to classify non-BNB items with the new schedule.

1971 also saw the first international seminar organised by CIG in association with the Dutch Cataloguing Committee and the Dutch Library Association which was held in Amersfoort, Holland. Issue 22 (Summer 1971) held a summary of the conference including the final paper on the 'Randtriever' at the University of Rotterdam. "*The Randtriever finds, conveys and shelves books in that library electronically. It consists of three components: the stack area with robots between the shelves, the consoles as the service points which activate the whole system, and the conveyor belts between the stack area and the service consoles*." (C&I 22: 16) A precursor to the kind of system now used in the University of Chicago's futuristic underground storage area, the Randtriever was ground breaking at the time, the only one ever installed in Europe and utilised for nearly 50 years. I admit I had no idea this kind of technology was up and running at this time.

Issue 23 discussed the exciting prospect of the forthcoming British Library, and that *"…crucial decisions on the future of the national cataloguing service…"* were soon to be made. A rallying cry was made for what was wanted: "*We must have an efficient and current national bibliography, we must have an efficient system of union catalogues, our national library must have a catalogue that is worthy to rank amongst the world's great bibliographies, we must have a computer based service that can be useful to all the medium and large libraries in the country. Above all, we must have a national cataloguing policy*." (C&I 23: 12) Issue 25 (Spring 1972) saw a write up of the 5th annual seminar of CIG which this time had been themed around the forthcoming British Library.

There was also an article on the pros and cons of standardisation and included a telling quote from an earlier survey on the use of AACR: "*We don't use cataloguing codes, we prefer to use our common sense*"! (C&I 25:1)

In a discussion over theory and practice it was observed that: "*AACR, PRECIS, MARC, ISBD, DC18, etc., etc., every day in every way we are all getting better and better, automation, amalgamation, centralisation, standardisation, the key words of a quiet revolution, we've never had it so good. The cataloguing department and the cataloguer are now held in higher esteem than ever before.*" (C&I 28:1) which led me to wonder what happened in the intervening years!

Summer 1973 (no. 30) revealed the results of a survey on the use of Dewey in the UK with 940 libraries participating, whilst issue 31 (Autumn 1973) was themed around 'non-book material rules. Issue 34 (Summer/ Autumn 1974) was a special enlarged issue featuring papers from the second Anglo-Dutch Cataloguing Seminar which was held at Cambridge. Issue 36 (Spring 1975) announced the principles guiding the revision of AACR. One of the objectives was to combine the British and North American texts which differed from one another. Issue 37 (Summer 1975) featured an Anglo-Nordic seminar on the revision and international use of AACR, which was held in York.

In issue 35 (Winter 1974) Ross Trotter had described the work he had done to develop the revised -42 areas table for England and Wales (because of sweeping changes to local government). As a follow up in issue 38 (Autumn 1975) he wrote about changes made to -41 for Scotland and Ireland. Northern Ireland was particularly tricky depending on the political allegiance of whoever was using the schedules and involved a meeting held in Ulster to ensure the agreement of the majority of librarians who were concerned.

Issue 39 (Winter 1975) also featured an article on Dewey as 1976 was to mark the 100th anniversary of the publication of the first version. Plans for DDC 19 and 20 were announced. Plaques honouring libraries in Britain for "*early adoption and continuous use of the Dewey Decimal Classification*" were to be awarded. I admit to being curious as to whether any of our current readers work in a library with one of these plaques – do let us know!
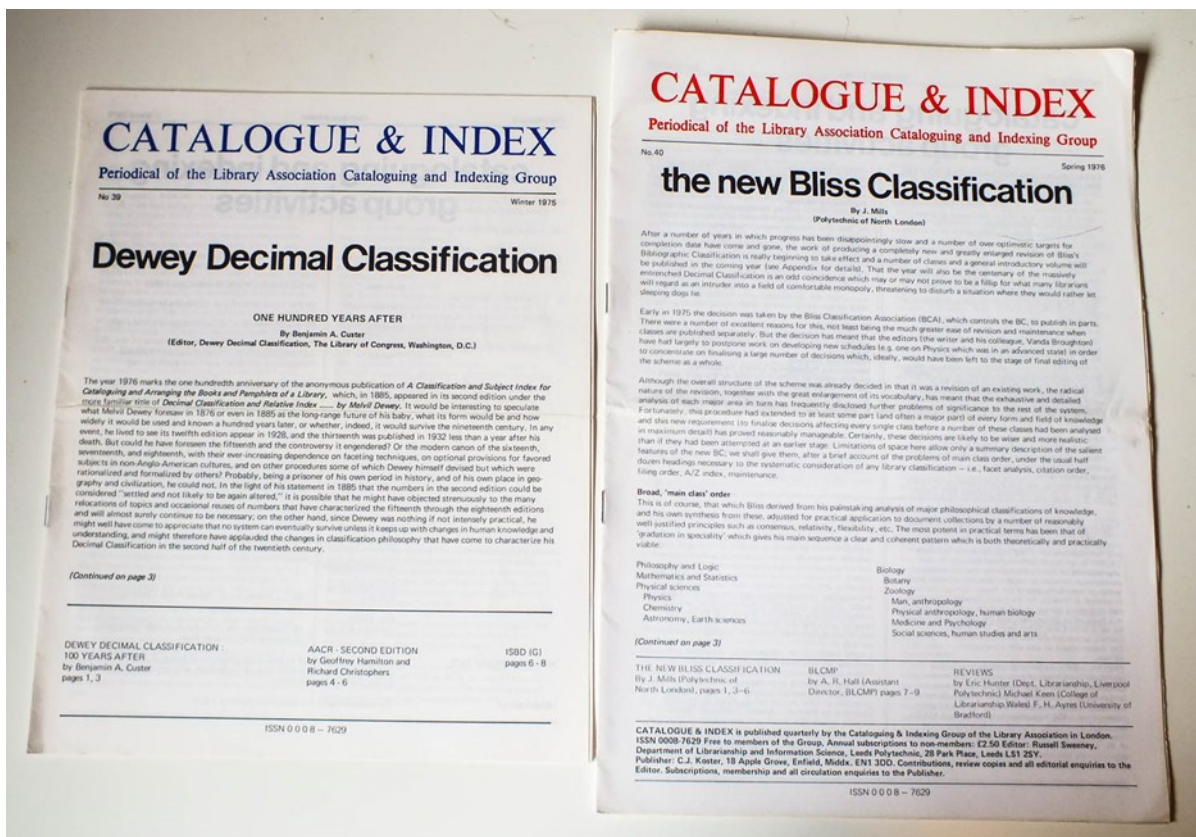
The look of C&I began to change with issues 38 and 39 moving to double columns, and by 40 the journal had also moved to a standard A4 size, the header now back to red again having been blue since issue 19 (July 1970). At this point the distribution was of 3,000 copies, including 250 overseas subscriptions.

Issue 40 (Spring 1976) featured a main article on the revised version of Bliss Classification. In issue 43 (Winter 1976) Aldyth Scott asked "Is the main entry dead?" and the following issue several letters responding to the debate with lively comments. Issue 44 (Spring 1977) included Ross Bourne informing people about ISSNs, ten years after the introduction of the ISBN. He noted that at this time a library school lecturer had assured him "*that the SBN had no future.*" (C&I 44: 1). Perhaps initial reticence was due to the fact that the ISBN wasn't designed for use by librarians but "…*came from the need of WH Smith & Son Ltd to mechanise the handling of their stock at their new Swindon warehouse*…"

In issue 45 (Summer 1977) questions were answered about the revision of AACR. Issue 48 (Spring 1978) featured an article by Carol Bartlett on a reclassification project at Kingston Polytechnic where some of the practices were distinctly unprofessional but did yield results. Issue 49 (Summer 1978) featured several articles on bibliographies. Issue 51 (Winter 1978) saw the announcement of the second edition of AACR by Peter Lewis who reminisced about the special issue of C&I in 1968 that he put together on the first edition of AACR and suggested that revisions of cataloguing codes and rules should perhaps be little and often rather than decades apart. Following on from this, issue 52 discussed a national training programme on AACR2 with cooperation between library schools, the Library Association and CIG. CIG's annual seminar for 1979 was held on the theme of AACR2 at the University of Nottingham. Issue 54 (Autumn 1979) held further articles on AACR2 and included a 'materiography'. Meanwhile issue 53 (Summer 1979) looked at the forthcoming Dewey 19 with the notification that the BNB would not be adopting it until 1981, and issue 55 (Winter 1979) provided a review of the scheme.

1980s

CATALOGUE & INDEX

Periodical of the Library Association Cataloguing and Indexing Group

No 57   Summer 1980
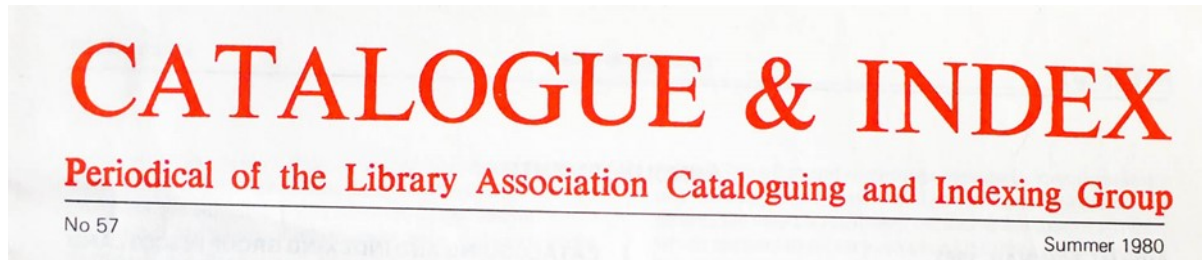
Entering the 1980s the focus remained on implementing AACR2, but also featured some exam script 'howlers' in issue 56 (Spring 1980):

"*BNB does not list incunabula; this it could do*."

"*Computer print-out catalogues are also portable. They are advertised in some journals by the picture of a woman reading one in bed*."

"*Pre-coordinate retrieval means that material can be retrieved before it is needed*."

Issue 57 (Summer 1980) featured an article on the abandonment of Dewey by East Sussex County Libraries utilising 'categorised' stock arrangements instead. Dewey did however continue to fill the pages of C&I along with AACR2.

Issue 60 (Spring 1981) marked a change of editor with Tony McSean taking the helm; he remained in place until the end of 1984.

Issue 63/64 (Winter 1981/Spring 1982) was a special double issue featuring the proceedings of a one-day seminar on "Cataloguing in publication: what is happening?". It was noted that well over 100 people attended and one of the recurring themes was the lack of published information about CIP, hence the decision to publish the papers in C&I.

Issue 66 (Winter 1982) contained an open letter from the Chairman of CIG raising the idea of a change of name for the group (something we know didn't happen until 2020) in order to cover new technology: "*There has been a recent burgeoning of buzz-words – information technology, telematics, informatics – and the taking up of librarians (or informaticians?) of all kinds of new technology, from computers to video discs and laser printers, and soon, perhaps, satellite communications and video phones. Do cataloguing and indexing belong to an age now past? Have they any future?*" (C&I 66: 1)   This query had a rousing effect on the readership and the following issue had seven pages of letters on the topic. Most saying they wished the name to remain the same, with one suggestion to change it to the Library Association Information Access Group.

Issue 70 (Autumn 1983) and Fred Ayres asked whether there was a future for cataloguers and made some prophesies about this future. By the millennium he suggested: "*Libraries will probably still exist as libraries, but the material they contain will not be restricted to in-house use or borrowing. It will burst through the walls of the library and into the homes of our users. The book, because of its superior packaging, will still probably be used in conjunction with direct access through facsimile transmission and through VDUs.*" (C&I 70: 3) Which I think pretty much sums up e-resources. He went on to say that "*The question that needs to be asked is whether librarians, and this includes cataloguers, will be able to adapt to new situations and make use of their expertise to exploit new technologies.*" I'd like to think that so far the answer has been YES!

Issue 71 (Winter 1983) shared information about the Joint Steering Committee for the revision of AACR2. In issue 72 (Spring 1984) opposing views on Dewey as an asset or a liability were aired by Ross Trotter and Arthur Maltby. Issue 74 (Autumn 1984) looked at problems in teaching cataloguing in a time of recession.

In 1985 Rodney Brunt took on the role of editor which he held until 1991, but he then went on to become the reviews editor until 2001. His first issue was a double one covering Spring/Summer 1985 (76/77) and featured a survey on the use of DDC in libraries in Great Britain and Northern Ireland. Also included was a paper on the 'Bibliographic control of feminist material' by Ishbel Lochhead, first presented at the CIG conference earlier that year. The following issue 78/79 (Autumn/Winter 1985) also contained papers from this conference on the 'Bibliographic control of archival film and photographic material' (Helen Harrison) and Grey literature (J P Chillag). Although I can't find a notification of the theme of the conference it certainly sounds to have included an interesting range of papers. The conference in 1986 was themed around "AACR2 five years on" and was framed as another Anglo-Nordic seminar. Issue 80 (Spring 1986) contained the keynote paper from this event given by David Buckle, whilst 81 (Summer 1986) contained two of the Nordic contributions from Inger Cathrine Spangen and Per Morten Bryn.

More about the revision of AACR2 appeared in 82 (Autumn 1986) and 83 (Winter 1986). Issue 83 also had a reflection on the history of C&I written by its first editor Peter R. Lewis, marking the 21st anniversary of the first issue. Issue 87 (Winter 1987) contained a piece about classifying books in a monastic library and dealing with the limitations of the 200 schedule in DDC, an issue that had been raised previously.
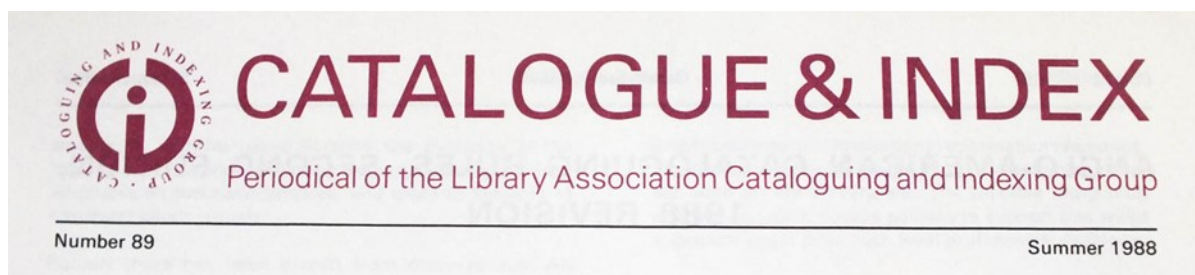
Without any fanfare issue 88 (Spring 1988) appeared with a new header for the journal incorporating a new logo for CIG which has remained with us ever since (only recently changing with the name change of the group this year), and a subtle colour change from red to burgundy.

Issue 89 (Summer 1988) raised some interesting thoughts via Lynne Brindley's paper 'Integrating the cataloguer into the library' first presented at the CIG 1987 conference. Some of her conclusions include: "*In the short term I envisage the demise of cataloguing as a professional activity, ameliorated by various forms of integration of the professional cataloguer, through stronger policy and managerial roles, moves which take the cataloguer closer to the users and to the primary service functions of the library. To achieve this it is essential to change the image of the cataloguer from a backroom one of limited horizons to a more positive one … and the individuals rise to the wider challenges outside of the cataloguing department.*" She goes on to say with reference to the 'global electronic library' that *"…the cataloguer is well placed to come to the fore as one of the many knowledge based system workers, 'knowbots' for short."* (C&I 89: 5) I'd be interested to know if people think our image has changed and whether many of us are now more fully integrated, or not?

Issue 92/93 (Spring/Summer 1989) was another special issue, this time publishing the proceedings of a seminar on the teaching of information storage and retrieval held in London in February 1988. The report included five papers plus an overview and summary of the discussion.

1990s

Issue 98/99 (Autumn/Winter 1990) was also a special issue celebrating the 10th anniversary of CIG Scotland.

In 1991 CIG celebrated its 25th birthday. At the LA conference held in Leeds that year, CIG held three joint sessions with other groups, and an evening session with cake and wine. A two-colour t-shirt was designed with the CIG logo and SILVER written beneath it (any current members have one of these? Would love to see a photo.). A reception was also held for members in September 1991 at LA headquarters.
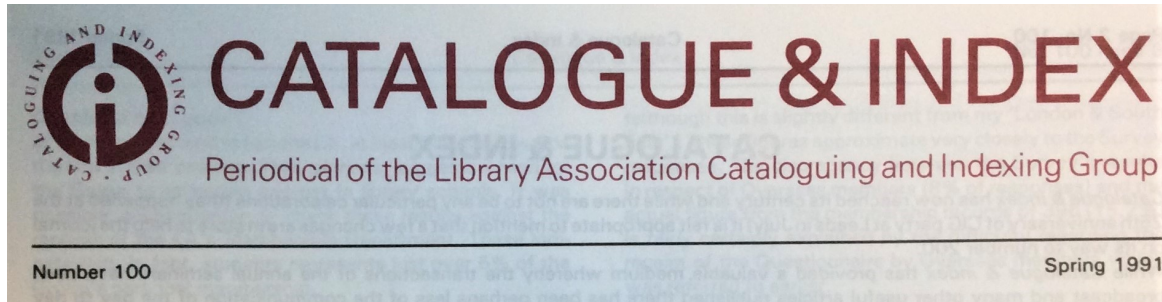
Issue 100 (Spring 1991) wasn't a special issue but did propose that in future activities undertaken by members as representatives on national and international bodies would be more fully reported. It was noted that an index of the first 100 issues was being compiled by Tony Curwen. The issue itself featured a report on the group's membership survey undertaken in 1989. 548 responses were received out of 2516 questionnaires distributed. One point I think worth noting is that there were some suggestions that CIG should set up "…*local meetings or local information networks for the informal interchange of information and experience*." (C&I 100: 5) Although CIG didn't do that, in recent years collaborating regional groups have come into existence across the country (see articles by Griffiths, Birley, and Phillips, in this issue). I believe that these groups needed to form organically where there was a drive and demand from people regionally, not necessarily involved with CIG or CILIP, rather than CIG trying to form groups using committee members as a focus.

In issue 103/104 (Spring/Summer 1992) Graham Muirhead took over as editor. This issue featured a piece by John Byford on 'The British Library, DDC, and the new building' and there was also a special offer for CIG members to sign up to visit the new BL building in January (1993). Issue 105/106 (Autumn/Winter 1992) saw another call for a possible name change of the group by the Chair Keith Trickey, reporting back from a recent committee meeting. The following issue saw a response from Mike Towsey the Treasurer, who was uncertain about a need for a name change but did suggest the rather unwieldy Bibliographic & Information Retrieval Systems Quality Control Group.

1993 saw a substantial programme at the UmbrelLA conference themed around 'Sex, lies and catalogue cards; or, the vexed question of access.' Issue 109 (Autumn 1993) held Gordon Dunsire's head lining paper which promised *"…a modicum of sex, lots of lies, and no catalogue cards."* (C&I 109: 1)

Issue 110 (Winter 1993) published the CIG mission statement in a hope to prompt dialogue from the members after several discussions regarding a name change, although there appears not to have been a flurry of correspondence in response. Issue 113 (Autumn 1994) published a paper by Peter Hoare given at the CIG conference that year in Retford, on 'Library catalogues and the library historian' which gave a good overview of the history of catalogues. This issue also saw two obituaries for Alan Jeffreys, a founding member of CIG and the group's first treasurer, and later chairperson, who had also received an MBE in that year's New Year's Honours, and sadly died in August 1994. His name is of course familiar to many of us who never actually knew him because of the subsequent establishment of the Alan Jeffreys Award, which was first announced in issue 121 (Autumn 1996).

Issue 115 (Spring 1995) saw the establishment of a new regular column about the internet written by Alan Poulter, called CIGnet. In issue 117 (Autumn 1995) Mike Towsey provided a snapshot look at the shape of the employment market for cataloguers. He concluded that there were still a reasonable amount of opportunities but there was a high proportion of temporary jobs (42%). There also appeared to be a possible decline in public library positions (which we know to have been the case).

Dewey raises its head once more with a paper in issue 121 by Gregory New and Ross Trotter on 'Revising the life sciences for Dewey 21'. I'm personally still dismayed when books with a 574 classmark (discontinued at this point) emerge from dusty corners in one of our libraries, there not having been a systematic reclass at any point.

Fred Ayres returns to once again ask about the future of cataloguing in issue 122 (Winter 1996) having made some prophecies in issue 70 [see above]; this time there was quite a bit of focus on the concept of 'manifestations' of works. He also suggested that libraries will become physically smaller because more book stock will be electronic and that information retrieval will be key: "*What will evolve over the next few decades are systems which will extract from the containers of information the exact information that is required and display it in a way that the user is capable of understanding.*" (C&I 122: 5) The same issue also contained a bite size piece on the idea of AACR3 which the author Antony Croghan believed should have come out in 1990, he concludes that: "*It is probably not too late even now to come to terms with a new edition before AACR2 has become too limited. I suspect that if it is left much longer a new edition will come as much more of a shock to cataloguers who have not had to cope with change or have had to cope with it in an isolated and possibly haphazard fashion.*" (C&I 122: 9) RDA anyone?

Issue 123 (Spring 1997) saw the announcement of the first recipient of the Alan Jeffreys Award, Ross Trotter. The same issue also saw the first of a new (but short lived) column compiled by Trotter on FAQs surrounding DDC. Sadly, there was also an obituary for Hugh Chaplin who had been the first chair of CIG.

Issue 125 (Autumn 1997) published the paper by Pat Oddy of the BL that should have been given at the CIG strand at UmbrelLA that year if the speaker hadn't been ill. The topic was 'Remind, reassure, reward: issues in developing a cataloguing strategy.' The paper contained a lot of valuable points, not least this one: "**You** *have to want to achieve the objectives, and* **you** *have to take personal responsibility for achieving them. That's why it is critically important to have objectives which mean something to you, and not just an anodyne 'mission statement'.* **You** *need to find your objectives personally inspirational.*" (C&I 125: 3)

Issue 129 (Autumn 1998) saw a new editor at the helm of C&I in the form of Nigel Owens who carried on until 2004. Issue 134 (Winter 1999) featured an address given by Eric Hunter at UmbrelLA in July 1999: 'The man with the oily rag meets the millennium: the life and times of CIG' which was an informative and light-hearted look back at the history of CIG.

2000s
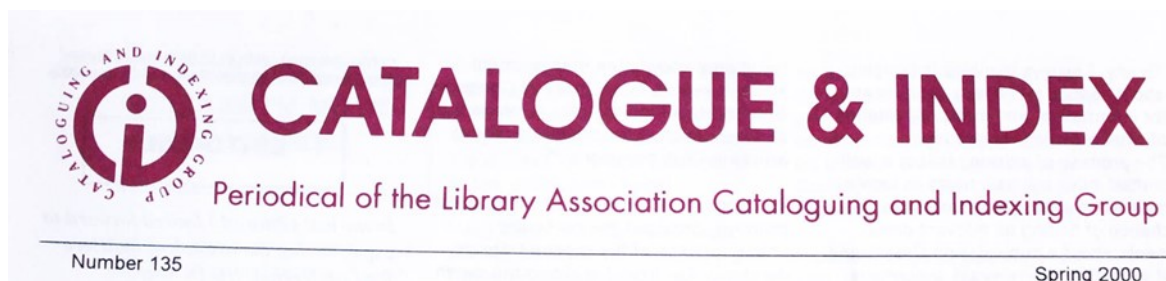
As we entered the new Millennium the CIG conference for 2000 was held in Hereford on the theme of 'The reflective practitioner' with the promise of a folk music session on the Saturday night. (I love folk music! This would have been a great conference for me, somehow can't envisage that being the conference social event in the future…). Issue 135 (Spring 2000) noted that Elizabeth Moys had been awarded an MBE for 'services to classification and indexing'.

Issue 137 (Autumn 2000) featured a short piece by Monica Blake on 'The loneliness of the long distance teleworker', an article that struck me as having some resonance for many of us who have suddenly found themselves working from home during lockdown. However, as she notes, there are certain benefits: "*… avoiding office politics; freedom not to commute; …and freedom to organise your work in your own way.*" (C&I 137: 8). Twenty years on and we also have a wider range of communication channels available.

Over several issues (137-140), within the letters' page, concern was raised about the state of cataloguing and classification education in Library Schools. A topic that is unfortunately still current today (with some notable exceptions).

Several issues featured some short articles on the development of a thesaurus for GCHQ, and issues 140 & 141 (Summer/Autumn 2001) also looked at 'Thesaurus development at the Department of Health' by Phil Defriez. In issue 143 (Spring 2002) Alan Danskin discussed the British Library's decision to adopt MARC 21 whilst also looking ahead to the *"…future of exchange formats in a web based environment."* (C&I 143: 1) This was also I believe the first time that the question "Is MARC dead?" was first raised in C&I as Danskin discussed the previous year's Marc Format Interest Group presentation in Chicago.

Issue 144 (Summer 2002) contained a research piece by Beverley Palmer on 'Cataloguing practices of public libraries in England' based on her Masters' dissertation which provided an interesting and timely snapshot of that sector. This issue also contained an obituary for Elizabeth Moys who had passed away in February.
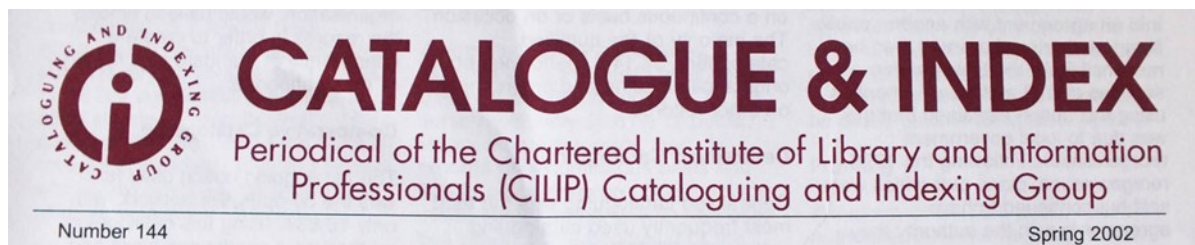

2002 was the year that CILIP came into being, formed out of the unification of the LA and the IIS. CIG took this opportunity to once again reflect on the role and purpose of the group and in issue 145 (Autumn 2002) published its mission statement for comment. This issue saw a follow up article by Alan Danskin on the BL's transition to MARC 21, alongside the experience of Imperial College related by Emma Bull and Ruth Newton.

On a personal note issue 148 (Summer 2003) caused me some delight. As I perused the letters' page I thought the situation one correspondent was writing about sounded very similar to my own experiences, I turned the page to find the letter was indeed written by myself, something I had long forgotten!

Issues 148 and 149 (Autumn 2003) contained a two-part article by Ann Chapman and Alan Danskin on the development of Functional Requirements for Bibliographic Records and the practical implications of adopting such a model. This was followed in the next two issues 150/151 (Winter 2003/Spring 2004) by another two-part article on FRBR by Tom Delsey which had originally been presented at UmbrelLA in July 2003. The following issue 152 (Summer 2004) noted that Delsey had been appointed as the editor of AACR3 due to be published in 2007.

Issue 153 (Autumn 2004) featured a paper given by Rodney M. Brunt at the 2004 CIG conference on 'The education of cataloguers', and addressed several of the issues that have been raised previously regarding teaching.

We then see a bit of a gap in C&Is publishing history with no issue appearing until 2006. In the meantime Nigel Owens had stood down as editor and Anne Welsh took over for two issues, with deputy editor Penny Robertson. 154 (Autumn 2006) featured a number of reports and conference papers from UmbrelLA 2005, and CIG conference 2006.
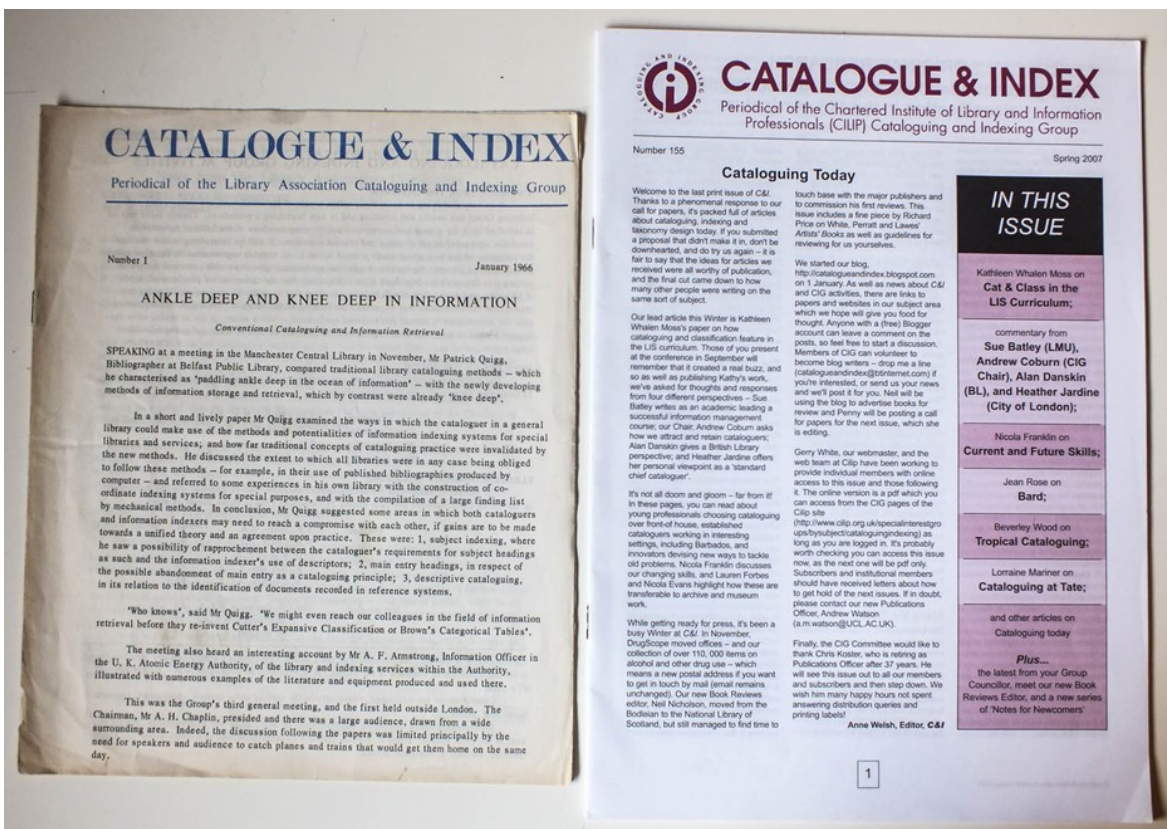
First and last print issues

Issue 155 (Spring 2007) was the last print issue of C&I; the committee thanked Chris Koster for acting as Publications Officer for 37 years, a task which included the printing and sticking of many labels. This issue led with a research piece on 'The role of cataloguing and classification in the LIS curriculum' by Kathleen Whalen Moss. A topic that has recurred throughout the pages of C&I, one of Whalen Moss's interviewees commented: "*In the mid-80s we thought the emergent technology would cause cat & class to disappear. That was wrong: a) the profession still want it and b) it is still needed.*" (C&I 155: 5) One key problem identified was the lack of suitable staff to teach this subject as those with experience retired, and those coming up lacked the skills, experience and practical knowledge. This article was followed up by commentaries from Sue Batley (London Metropolitan University), Andrew Coburn (Chair of CIG), Alan Danskin (British Library) and Heather Jardine (City of London Libraries) providing viewpoints from different areas of the profession. This issue, coming in at a large 28 pages, is packed with a variety of smaller articles and introduces a 'Notes for Newcomers' section, as well as the new book reviews editor Neil Nicholson. There was also notification that the CIG blog (only started in January of that year on Blogger) was the first CILIP group blog to move across to the CILIP Communities platform.

Online

I won't go into as much detail with the online issues as they can be accessed via our archive. The first few have no dates but I can surmise that it may have taken a while to sort out this online version and to settle down into regular production; our archive also appears to be missing issue 159.

The first issue of C&I online, number 156 (no date), was edited by Penny Robertson who was sole editor until 2011. Issue 157 (no date) featured papers from the CIG conference in Glasgow in September 2008.

2010s

Issue 161 (December 2010) is the conference issue featuring papers from the event in Exeter. Although throughout its history C&I has shared conference papers, it is really from this point onwards that the December issue in a conference year becomes dedicated to those presentations. Hence 169 (December 2012) has the papers from Sheffield, 177 (December 2014) has the Kent papers, 185 (December 2016) has the Swansea papers, and 193 (December 2018) the Edinburgh papers. We look forward to 201 (December 2020) which should be featuring the papers from our first online conference.

It is from about 2010 that the issues start to become more regular again and have since fallen into the format of four a year in March, June, September and December. It is also from this point that issues have become more specifically themed featuring issues on topics, for example, such as RDA (163, June 2011; 173, December 2013), classification (168, September 2012), discovery layers (170, March 2013), linked data (174, March 2014), institutional repositories (187, June 2017), ethics (191, June 2018), training & outreach (196, September 2019) and most recently the transformation of data (199, June 2020). Some topics we have returned to a couple of times (such as RDA), and we are always looking out for new themes to focus on, so do get in touch with any suggestions.

During this time we have also moved to a 'joint editor' way of working which has probably helped to maintain the regularity of the issues in the last decade with the ability to 'share the load'. In June 2011 Cathy Broad and Heather Jardine took on the role. Helen Garner took over from Cathy in January 2013, and I (Karen Pierce) took Heather's place in March 2015. Deborah Lee replaced Helen in March 2017, and she was followed by Philip Keates from June 2019. I will be leaving this role myself at the end of this year.

As we have passed through the years it has been interesting to see discussions around various rules and schedules, such as the development of AACR (and subsequently RDA), and the different versions of Dewey. We have heard from a variety of type of libraries (public, academic, national, etc.), as well as the library schools, with C&I being a good platform for discussions, to complement the reports of meetings and seminars. There was also plenty of news from outside the UK as well as collaborative international seminars. As time went by it became normal to print some of the papers given at the annual residential CIG seminars or conferences. A couple of papers would be spread over several issues, whereas these days we now have a concentrated conference issue. Here we see the benefits of being an e-resource rather than print, as these issues have become very large. I was also interested to see what a strong presence CIG used to have at the LA annual conference (UmbrelLA) which originally brought all the special interest groups together and provided proper streams of SIG themed papers - we seem to have drifted far from that ideal, let us hope to return in the future.

Although throughout its history the editors strived to bring out four issues a year there has been some wavering over the years, occasionally with double issues used to bridge a few gaps. However, as noted above since October 2010 the regularity has been consistent. New features have come and gone, sometimes not lasting more than one issue, and there has been an ebb and flow with letters, sometimes an outpouring in response to a controversial topic, and often a dearth of any correspondence. We'd love to hear from you so do consider contacting us as it would be good to reinstate a 'letters' page'. One topic that did prompt people to write in was the suggestion of a name change for the group which periodically re-emerged to the fore and has finally taken place this year.

I hope you have enjoyed this stroll through our back catalogue of issues, and hope even more that it might prompt you to comment, write a letter, write an article, and contribute to this journal which provides so much interesting and relevant content to our profession.

I would like to note that this article wouldn't have been possible without our 'archive' of back issues which I believe came from one of our members a number of years ago; Peter Gann, a retired bibliographer who used to be in charge of cataloguing for the London Borough of Bromley.
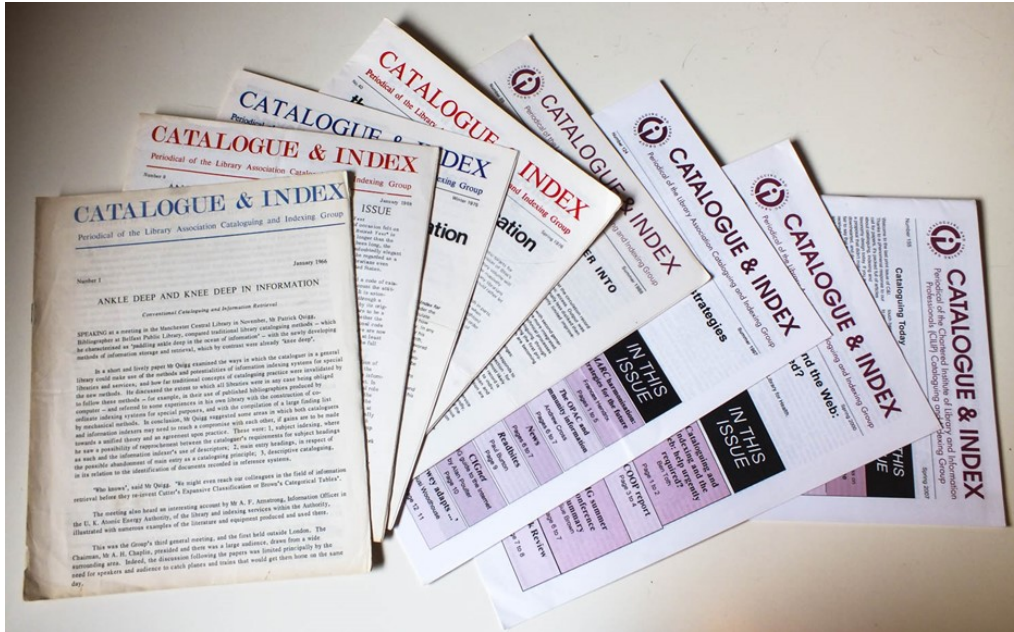
Roll Call of past Editors

Peter R. Lewis: 1 (January 1966)- 17 (January 1970) – as solo editor
         18 (Apr 1970) -28 (Winter 1972) - as Consultant editor

Michael Gorman: 18 (April 1970) – 28 (Winter 1972)

P. J. Quigg: 24 (Winter 1971) – 28 (Winter 1972) - on the editorial board

Russell Sweeney: 29 (Spring 1973) -59 (Winter 1980)

Tony McSean: 60 (Spring 1981)- 75 (Winter 1984)

Rodney Brunt: 76/77 (Spring/Summer 1985) – 101/102 (Autumn/Winter 1991)
         [103/104 (Spring/Summer 1992) - 141 (Autumn 2001) -As reviews editor]

Graham Muirhead: 103/104 (Spring/Summer 1992) -128 (Summer 1998)

Nigel Owens: 129 (Autumn 1998)- 153 (Autumn 2004)

Anne Welsh: 154 (Autumn 2006) – 155 (Spring 2007)

Penny Robertson: 154 (Autumn 2006) - 162 (April 2011)
         [as Deputy Editor: 154 (Autumn 2006)-155 (Spring 2007)]

Cathy Broad: 163 (June 2011) - 169 (December 2012)

Heather Jardine: 163 (June 2011)- 177 (December 2014)

Helen Garner: 170 (March 2013) - 185 (December 2016)

Karen Pierce: 178 (March 2015) –

Deborah Lee: 186 (March 2017) - 193 (December 2018)

Philip Keates: 195 (June 2019) -

My tenure as editor of *Catalogue & Index* was short (2006-7), and at a time when lots of changes were happening in the world, in libraries, and in my working life. The commission for this article was, by its nature, one that requested something very different from the sort of piece I normally write, as it asks for that most subjective and unreliable of things, a memory.

Karen sent us all some prompts, asking about changes during our time in post, and I think the key ones were:

- Restarting the publishing programme
- Moving from print-only to print and online
- Starting the *C&I Blog*

After a few words on each of these topics, I'm going to reflect on the 'Cataloguing Today' special issue that I commissioned, and which I hope provided everyone at the time with a snapshot of how things were, when lots of new technology was coming in – technology that we take for granted now and that to some extent changed how we worked irrevocably.

Everything is Technical

For various reasons, *C&I* hadn't been published for a while, and there were technical issues to be resolved. That was one of the reasons I took the role – my career up to that point had largely involved going in, sorting things out, and then moving on. Hard to believe now, as a young person I was restless and enjoyed change. I knew I could fix some of the issues.

Print-only was Standard

Like most CILIP journals at the time, *C&I* was entirely print, and distributed only to members. Neil Nicholson and Andrew Watson did a lot of work to manage the mailing lists and answer queries from members and subscribers. I *loved* working with the printers – I'd previously spent a spell as production coordinator for a publishing house and it was great to be back in that print deadline environment. I also enjoyed the relationship management aspect of the role. However, one of the challenges was the need to move to a model that was online or partially online. Penny Robertson, who was Deputy Editor, did a brilliant job of creating the (then) new-style online format for *C&I*, and took it forward as Editor when I, true to form, departed after the technical issues we had faced were resolved.

Do You Remember Web 2.0?

All this was back before Twitter, when "Web 2.0" was a Thing that was so new and shiny that some of us were asked to speak at big glossy conferences in posh hotels and large conference centres because we were using RSS feeds and sharing how easy it was to create blogs. I think the main reason I was appointed was because I had created several newsletter, blog and RSS services in my day job, and the committee knew it wanted something similar.

http://catalogueandindex.blogspot.com went live on 1 January 2007, with the contents list of the Summer 2006 issue, http://catalogueandindex.blogspot.com/2007/01/issue-153-summer-2006-contents.html, and then we moved to the brand new CILIP Communities in April, http://catalogueandindex.blogspot.com/2007/04/same-blog-new-platform.html. At the time, I wrote, "*CIG is proud to be the first Group to set up a blog at CILIP Communities, and we hope that all our current blog readers will not be inconvenienced too greatly by this move.*"

Behind the scenes, the new software was challenging for the CILIP web-team to manage, and challenging for us to add content. "LOL," as we would have typed back then on our Nokia phones with their limited number of characters and pay-per-text pricing plans.

Not *Everything* is Technical

Straightening out technical issues took much longer than I had thought, even with Penny working on the redesign and handling that. It would have been impossible to manage without Penny, who went on to be a far better editor that I could have been. Back then, I was always comfortable in problem-solving deputy posts, and had yet to learn how to report back effectively when roles grow beyond their original scope and the work time available for them. I remember working and working and feeling like I couldn't pedal fast enough. It was lucky that I was reporting into such a lovely committee, who at that time consisted mostly of really experienced bibliographic services managers. Eventually, when I told them how much I was doing in the voluntary role, they were brilliant, and we created new committee roles to deal with the Web, Social Media and Journal, which made everything manageable again.

I remember at the time being very glad that this experience had happened in a voluntary position. Several of my friends in library systems roles were experiencing a similar squeeze – early content management systems for websites were sold to companies as an easy solution for all their website needs, but for the people tasked with adding content often it was a return to the mid-nineties experience of inputting a small amount of data and going to make a cup of tea while it uploaded. Of course, it also helped that many of the committee members were either the people charged with implementing these content management systems or – probably more challenging – managing the people who were, and explaining to their own senior management why something that looked so quick and easy in the sales demo for the software was easy, but certainly was not quick.

In any case, my big takeaway from being editor was that technology and relationship management is not always enough. Having good senior people and being able to approach them is a mixture of a blessing and a life skill, and I will always be grateful to the CIG committee at the time for that.

What About the Editing?

While focusing on the technical issues, it was surprising to discover that editing itself was quite easy – a mixture of having an idea of what people want to read and finding the right people to write those articles. The one issue that I put together myself, without articles commissioned by the previous editor or by Penny was the 'Cataloguing Today' double issue in 2007. It's not in the online archive, but the contents page is here: http://catalogueandindex.blogspot.com/2007/02/issue-155-winter-20067-contents.html

I can remember commissioning the pieces, which included a research paper by Kathleen Whalen Moss on Cat and Class in the LIS curriculum in the UK. Based on her Masters research, she presented it at the conference in 2006, and it brought the room to complete silence and then an onrush of questions, because people, then, were so shocked at that transition from teaching people *how* to catalogue and classify to teaching *about* cataloguing and classification. Of course, with the benefit of hindsight, we can now see that the way the subject field was developing, it was going to become harder and harder to teach a how-to class that was both thorough and comprehensive, with the rise in taxonomy design, citizen science contributing user-generated subject terms, and the fast-approaching introduction of RDA and soon-to-be-upon-us move from MARC to Bibframe. But at that time, in that conference hall, all this was ahead of us, and there were just a lot of angry bibliographic services managers amazed and vocal about the loss of university courses teaching "our trade."

This Was When Public Libraries Had Big Cataloguing Teams

Indeed, the thing that stands out to me in the commentary section of that issue of *C&I* is the presence of opinions from two of the great Bibliographic Services Managers from the public library sector – Andrew Coburn of Essex and Heather Jardine of City of London.

Andrew's piece was prescient: as well as being concerned about recruiting new cataloguers, he could see that for promotion his best staff would have to move out of Cat and Class, and, indeed, that was to prove the way of things. Shelf-ready data has come to dominate the field for new books and we now seem to accept that public libraries will buy in their data and academic libraries similarly *most* of their data.

Heather's piece complements Alan Danskin's in discussing the things they look for in new cataloguers. These, I think, have not changed – Heather summarised it as "recruiting the attitude" and then training from that point. Alan was keen to see people educated to ask questions – of the materials in their hands they were cataloguing; of the authority files they were searching; and of more experienced cataloguers. This seemed both excellent advice, and also an achievable learning outcome for someone learning to catalogue for the very first time. Cat and Class can be daunting skills to acquire, and I doubt any of us on our first day imagined that we, too, might one day be chatting away to friends at CIG conferences using MARC tags and Dewey numbers. But learning to ask what those tags and Dewey numbers mean? That's an attainable goal. (Sidenote: talking in tags is jargonistic and not something of which we should be proud. Thankfully, I've not heard anyone talk in DDC numbers for years – I guess we all know how exclusionary *that* is).

What Else Did We Care About?

Other articles have also stood the test of time, I think. I'd love to see updates on some of these pieces – Jeffrey Beall, has, of course, published much in the area of information retrieval and the importance of metadata. I'm not sure that we would think about "traditional" and "non-traditional" as the distinctions in recruitment that Nicola Franklin saw daily in her role at Sue Hill back then. (Nicola now works for the *LA Times* as Senior Director of Talent Management, so she herself has taken her own transferable skills from recruitment and developed them in a field I don't think existed back in 2006-7). In any case, looking at recruitment adverts, the distinctions now seem to focus on whether a role is about data and metadata creation, and / or manipulation, and whether it is working with mainly electronic materials, mainly print, or a mixture of the two. However, the advice she gave back then, about tailoring applications and CVs, examining the job specification and asking questions at interview to determine if something is the right match for applicants, still holds true.

The rest of the articles give glimpses into the activities of cataloguers in different sectors – academic, public library, museums and galleries – and highlight different activities in which many of us were involved back then – selecting and applying classification schemes, information architecture and managing other staff. There's a shift outwards from libraries themselves, with pieces on museum work (not solely museum library work), archival description, website development and, of course, working as an embedded librarian in a law firm.

What's Changed?

Perhaps this has been one of the greatest trends by number in the roles of new professionals? Whereas the destination of most of my graduating class from Aberystwyth in the 1990s was back to their originating libraries, these days most new professionals are not funded by their workplaces, or, if they are, their workplaces tend to be corporate – banks, law firms, and tax accountants do still seem to offer some funding for staff they wish to retain. Those that don't fund training do at least recruit a lot of new information professionals, either for their libraries and / or to embed in practice teams. The other first-destination for a lot of people keen on cataloguing today seems to be institutional repositories. These did exist in 2006, but not in the quantities that they do today. (I remember a big upswing in the number of papers on university repositories at the CIG conference in 2014, so perhaps that's the timeline). Of course, such observations are tentative, because they *are* only observations.

That is, perhaps, the joy of the kind of special issue Karen and Phil have commissioned. It's not about facts and figures and quantitative research, but about people's recollections, and it's people that make our cataloguing community.

Anne Welsh, former editor of Catalogue & Index, founder of Beginning Cataloguing,
info@beginningcataloguing.com

Personal, professional and political: editing *Catalogue & Index*

Heather Jardine, (retired)

I was editor of *Catalogue & Index* from March 2011 to December 2014 (issues 163 to 177). To be clear at the outset, I wasn't The Editor, but a co-editor – working first with Cathy Broad and later with Helen Garner. I record my thanks to both of them. It makes good sense to share the burden, because in case of holidays or crises you can help each other out, and it enables succession. You learn from each other and you support each other. *Learning* and *support* are important words when it comes to *C&I,* for editors as well as readers.

I clearly remember how I got involved with the CIG Committee. It was a friendly hand on the shoulder at the Conference and some flattering. But I cannot remember exactly what prompted me to volunteer to become an editor, although there was a job to be done, and I like words. Beyond the immediate impulse, however, there were (and still are) three good reasons for editing *Catalogue & Index* – personal, professional and political.

I was getting towards the end of my career (although I didn't realise at the time how close the end would be) and I suppose I could have been disinclined to learn new stuff and just trundled contentedly through the old familiar routines; but I found it to be rather the opposite, that having got as far as I could in my job, I had to look for stimulation outside. When you ask candidates applying for cataloguing jobs what qualities they think will be needed, they almost always reply in terms of accuracy, consistency, conscientiousness and obedience to rules. I believe that curiosity is equally as important, probably because I am curious (in both senses of the word, possibly) and I do not see how you can be a good cataloguer, and certainly not a good classifier, without the kind of mind that enjoys getting engaged with new stuff.

And of course the world of cataloguing is constantly changing, RDA was lurking over the horizon, technology was galloping ahead, so there was plenty to be interested in. Being the editor turned out to be a good way of expanding my horizon and pursuing fresh ideas. I read things and went to places I would not otherwise have explored.

But however engaging the pursuit of the new stuff was, being editor isn't just about self-development. It is about spreading that knowledge, and spreading it to as wide a range of people as possible. I tried to remember that the readers of *C&I* might be new professionals with very little training in cataloguing; or solo librarians with not much in the way of support at work; or mid-career folk being faced with new and slightly daunting responsibilities. They might all need a helping hand from their professional peers. Our readers might also be senior academics with Big Brains, but I will admit now that I didn't feel we should be publishing articles which did not have a relevance to practice. Big Brains have their own journals for that. By all means ask them to write authoritatively about new ideas and developments, but try to ensure that it is related and relevant to day-to-day experience. You can argue for eternity about whether cataloguing is a science or a craft, and of course it is a bit of both. The theoretical basis of cataloguing is what sustains it; but it is its application in the workplace, how it can be used, that is relevant to the practitioner.

But *C&I* shouldn't be just a one-way process of handing out information, top down. Like the Conference and CIG (now MDG) itself, It should make people feel not just that there is someone out there who has their back, but also that it is a forum in which they can contribute as well as consume. That is another reason for keeping it pragmatic, so that people who have achieved something new or done something differently feel able to share it without feeling inadequate because their article doesn't use long words. I wanted contributors to write in a way that was widely accessible, that everyone could understand. I think we tried as hard as we could to get new voices into *C&I*, to make it welcoming and to make it belong to the community. I hope that writing for us gave people the confidence to move forward in their careers.

And so to the political reason why I wanted to be editor. I was working in the public library sector, where people like me were being hunted to extinction, and it was important that our voices were still heard. It mattered that we could be seen, to ourselves, our colleagues and our masters, to have skills that were recognised and valued outside our own libraries. It didn't save us, but at least it made us feel (I hope) not as worthless in the wider community as we were being made to feel at work.

Did I enjoy my time as editor? Yes, of course I did. There are downsides to the job – I don't miss all that fiddling about trying to cram images into Publisher and make text fit pages, a process that led to much strong language, especially at the end of a working week. Nor do I miss nagging and cajoling contributors to come up with the goods by the deadline. But it was enormously satisfying when someone found their voice and connected with their community.

Would I recommend it to someone considering taking on the role? Yes, of course I would. It gets you out of the office, figuratively as well as literally. It was interesting, it was challenging and in a weird sort of way it was fun. And I believe that *C&I*, as well as MDG, in the future as much as in the past has an important role to play in developing and supporting everyone, everywhere, who works in technical services.

Heather Jardine (former editor of Catalogue & Index) retired in August 2013 and is currently Librarian of the St Albans and Hertfordshire Architectural and Archaeological Society.

Reflections on being a co-editor of *Catalogue and Index* Journal

Helen Garner, Metadata Services Manager, Library Services, Sheffield Hallam University

I joined the *Cataloguing and Indexing Group* in 2011 and was looking for ways to contribute to the work of the committee. I was quite involved in the sub-group which organised the 2012 Conference in Sheffield and had written a book review for the journal but not much else. So, when the opportunity to get involved in editing the journal came up, I gave it serious thought and put my name forward. I wasn't 100% sure what I would need to do or how much of my free time it would require, but I was keen to get involved.

I began by working alongside Heather Jardine, who was an experienced library professional and a wise head to work with. Heather had already been editor for about 2 years and was able to pass on her know-how and wisdom and provide valuable second opinions on things. The main aspects of the role as an editor, during my stint at least, was to firstly ensure that the agreed topic of theme for the issue "call for papers" went out on time via social media and the monthly ebulletin, then monitor and liaise with the co-editor regarding how many offers we were getting from potential contributors. This would vary from issue to issue and we sometimes found ourselves having to go for a more pro-active approach. In my experience, we mostly got a positive response when approaching people with known expertise in a particular area and sometimes up to about half of the papers came via this route. I guess some themes did limit the number of people who felt they could write on a topic. When the themes were more general it was encouraging that we would get more offers to contribute. It was always nice to get contributions from first time contributors, too. As editor I also provided some advice to contributors on the scope of an article, to ensure that it had focus and matched the theme of the issue, especially if the initial suggestion was quite general or too big. Editors also need to consider potential legal or ethical issues, for example we would need to check that authors have obtained permission to use third party images such as screenshots from software products and that comments made about system or service were fair and objective. The editor can also give extensions to deadlines or decide to use an article in a later issue of the journal. It was always good to get the paper later than not at all and short extensions didn't really cause much delay to the production of the issue. As a general, rule six or seven articles, plus reviews seemed about the right length to aim for. Occasionally, I corrected spelling or grammar or adjusted the reference style, but usually the writing was of a very high quality.

Once the articles had been received and the papers read and the order agreed, we then rotated which editor would transfer the articles into the Publisher template. For me, this aspect of the role, was the most time-consuming. I like using Publisher now and use it in my day job, but initially I struggled to figure out how to do things. My approach was to copy text no more than a paragraph at a time to avoid any slippages as it was easy to lose things off the bottom of the page. I would have hated to have messed up anyone's paper by losing a sentence and it was much easier to avoid it happening than to correct it. The most difficult paper to paste into Publisher was on the Introduction to linked data from issue 174, as it had lots of examples of coded data that used a mix of fonts, font sizes, superscripts and spaces between paragraphs, footnotes and indentations. It was hard to make it look like just the manuscript. I needed to match everything across exactly otherwise the text or examples might not have had the same meaning. Generally, once the journal issue was produced, I would then print the whole thing out and proof-read it and make any corrections. I can appreciate why you sometimes see accepted manuscripts with numbered lines, as it must help a lot with proof-reading. I would then send the finished version over to the co-editor to do another proof-read and write the editorial introducing the issue and then the issue would be ready to be distributed which was always a nice feeling of relief and satisfaction.

During my time as co-editor, I think there was a good mix of articles which were either from practitioners describing their work activity and papers on more theoretical topics. Themes such as RDA, social media, linked data and even discovery layers were new and interesting back then but we also included fresh perspectives on classic topics such as authority control, rare books work and classification.

One of the main changes that was implemented during my time as a co-editor was the move to the journal becoming Open access. I understood the benefits of Open access as part of my day job includes metadata work for the institutional repository. I think there was a general feeling from committee members that the time had come to look at making C&I an open access journal. This would mean that all contributors to the journal could access their article, rather than it be limited to members of the CIG group or subscriber to the journal, or wait for a year when it was freely available in the archive. We did allow articles to be archived in an institutional repository but that wasn't an option that all contributors could use. It felt awkward that we would often have contributors to the journal, who couldn't access the journal they were writing for. For example, we had contributions from people who worked in a more Library systems role and contributors based outside the UK. At the CIG AGM in September 2015, we voted to make C&I an open access journal as this would give contributors the widest possible audience for their papers and also give C&I the widest possible audience for its journal. I am proud that this change was made during my time.

On a personal level, I gained increased skills in use of Publisher, which I have applied to my work. Increased appreciation of the journal publishing process, useful for the repository side of my role, e.g. how small journals done by volunteers operate compared to the big publishers and gained valuable experience that could go on a CV or professional validation submission.

I stepped down from the editor role in 2016 when my time on the committee ended. I was a little sad to leave the editing job, but I guess it was good to get some of the time back for other things. One of the best things about such a role is that you get to work as part of a team with people outside your workplace and I was fortunate to work with both Heather and Karen (Pierce) who were very good editors and fun to work with. The success of the journal depends not only on the work of the editors, but also on the contributors offering to submit papers, I would like to thank everyone who contributed to the journal, sharing their expertise and experience.

Helen Garner, former editor of Catalogue & Index

Cataloguing toys, loving WebDewey, and supporting metadata authors: reflecting on my time as a co-editor of *Catalogue and Index*

Deborah Lee, Visiting Lecturer, Department of Library and Information Science, City, University of London

I was fortunate enough to be one of the co-editors of *Catalogue and Index* from January 2017 until December 2018, when my term on the CIG committee – as it was then known – came to an end. I enjoyed this role immensely. An important part of the role is generating the themes and locating authors for the issues, which is a great privilege and quite a responsibility. During my co-tenure, the co-editors would regularly ask questions to ourselves and the CIG committee such as "what would be really useful for metadata professionals to read about at this time?", "what have we not covered or neglected and would be good to focus on this issue?", and the perennial "is it too soon for RDA again?!". Of course, I would like to say that as soon as the call was out, the suggestions and offers of articles flooded in. While sometimes they did, sometimes Karen Pierce (co-editor) and I wrote (hopefully) persuasive emails to people who had shown an interest in that topic, asking whether they might be interested in writing an article. I never failed to be amazed at the generosity of those we wrote to in agreeing to write an article, or in thinking about who else we could ask if they could not help. What is also striking is how many articles came from those outside of "traditional" cataloguing or even library roles: it highlighted to me that *Catalogue and Index* is much wider than being "just" a professional journal for metadata librarians by metadata librarians.

Three particular journal issues and aspects of editing particularly stay in my mind. The first is the journal issue Karen Pierce and I put together with the theme of cataloguing non-text-based and unusual library materials (Issue 189, December 2017). This included articles about music, three-dimensional objects, board games, toys, and more. This issue in some ways epitomised the huge value of *Catalogue and Index*. First, we had contributions from a variety of countries, covering three continents. Second, this was a wonderful opportunity to reach out to our sibling communities working with specialist formats; so, there are wonderful articles about music cataloguing, sound recordings and artists' books. Third, I hope that even if someone does not encounter unusual resources in their working life, it would still be interesting to read about cataloguing, say, toy volcanoes and board games just for fun. (If you have not seen them already, the articles by Bernadette O'Reilly and Alissa McCulloch which discuss these topics are really great reads (McCulloch, 2017; O'Reilly, 2017)). Fourth, with my other hat on as a researcher and lecturer in information organisation, I find *Catalogue and Index* a useful teaching resource. For example, Issue 189 has been very useful when teaching information organisation: I have assigned students to read two of the of the articles in this issue to illustrate the variety and intellectual challenges of professional metadata work, and I use one of the articles from this issue as a source for an indexing activity. Knowing that *Catalogue and Index* is being used as learning materials by the next generation of metadata professionals is deeply rewarding.

The second journal issue which I found particularly memorable is the one where we "commissioned" various metadata professionals to write about their love of a particular information organisation text, in a section entitled "Why I love …" (Issue 190, March 2018). Here, like always, the co-editors were greatly aided by the CIG committee as a whole who wrote, or persuaded others to write, these vignettes. The responses were truly heart -warming.   As just one example, the creativity of Fotis Mystakopoulos' "love-letter" to WebDewey, is as ingenious as it is amusing (French et al., 2018).

The third aspect of my time as a co-editor which I found particularly significant was working with first-time or nearly-first-time authors. It was always especially joyous when someone approached the editors, or gave an affirmative answer to an email request, who was new(/ish) to writing. I know from my own experiences of authoring articles, of the importance of the interactions between the author and editing team, especially to a new(/ish) author. As a co-editor, I tried to allay fears or concerns, and to make it clear that everyone has to write their first article before they can write their second! I tried as an editor to always encourage and explain, to edit where necessary but leave the voice of the article untouched, and above all, to communicate with the authors.

So, many congratulations to *Catalogue and Index* for reaching its 200th issue. And, if a future article includes some content analysis of *Catalogue and Index* topics in the 2010s, then I would love to know whether RDA really does win the award for most coverage!

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Deborah Lee, former editor of Catalogue & Index

I find it hard to believe that a career in librarianship began in earnest as a Library Assistant in the Technical Services section of the University Library of St Andrews almost forty years ago. The title of this article is of course the title track of Bob Dylan's LP released in 1964 and is a fitting theme for the constant change and evolution in the field of cataloguing during these years.

How did I end up becoming a cataloguer after graduating with a Masters Degree in History from the University of Edinburgh back in 1978? Well, I believe the seeds had been sown early on in my life and the blame lies squarely with my father. He was an avid reader and his love of books led him to take me with him to Kirkcaldy Central Library on Saturday mornings. I caught the reading bug and from then on a birthday or Christmas never passed without my receiving a book token. Looking back on it now, Kirkcaldy was quite an affluent town during the 1960s and 1970s, with thriving coal, linoleum and linen industries. The town also boasted a high street full of splendid family-run shops one of which was a fine bookshop called James Burt the Bookseller, a real magnet for me.

Fast- forward to 1978 and I found myself flying off to Canada to do a Graduate Masters Degree in History at McMaster University, Hamilton, Ontario. It was during my time there that I decided I would follow a career in librarianship. As part of the terms of the scholarship I was offered the opportunity to be responsible for the departmental library and also to represent the departmental library on the University Library Committee. Thus was born my first experience of library committee work, something that was to stand me in good stead further down the line.

Having made a career choice, I turned down the offer of a place in the doctorate programme at McMaster to take up an opportunity to study for the Postgraduate Diploma in Librarianship at the University of Strathclyde in 1979. It was there, under the tutelage of Frank McAdams and Jimmy Tait, that my passion for cataloguing and classification was ignited. There was a lot of practical work on the course and we learned how to describe items according to the Anglo-American cataloguing rules (AACR2). Classification schemes such as Dewey, Library of Congress and UDC were also taught and practised thoroughly.

Although I enjoyed the other subjects on the course, particularly Bibliography, taught by Jo Haythornthwaite, and Historical Bibliography, taught by Professor Bill Tyler, I hoped that cataloguing would become my speciality. The attention to detail in the description, as well as the detective work involved in constructing both name and subject headings, attracted me to this field of librarianship.

It was a stroke of luck I happened to notice a tiny advert in the job section of the Dundee Courier and Advertiser (Fife edition) for a library assistant in the University Library, St Andrews. I was fortunate to be appointed and so began my career in cataloguing in the autumn of 1980. It was a marvellous place to work back then. You have to remember this was well before online catalogues, PC workstations, the Internet and social media workshops. Looking back to this period, it seems much more scholarly and almost like a golden age of cataloguing. We used the Library of Congress Classification Scheme and Library of Congress Subject Headings and described items according to AACR2 rules. Catalogue entries were handwritten on slips for sheaf catalogues, with the details also typed and then pasted into guard book catalogues for the use of students.

I learned a lot from my colleagues in the Cataloguing sections, particularly from the Head of Cataloguing, Jim Kidd. He was one of the most knowledgeable people I ever worked alongside during my career. He was also responsible for compiling the Annual Bibliography of Scottish Literature over a number of years. Jim Kidd sadly passed away in 2018 but his legacy lives on for those fortunate to have worked with him in the University Library and also with his endeavours with the publication of the bibliography.

I have always treasured my time in St Andrews but looking back I took a calculated risk to move into public libraries always hoping I would one day return to an academic library. There were certainly more opportunities in public libraries in Scotland during the eighties and nineties. I ended up spending just over ten years as a Library Officer (cataloguer) in the Database Management Section of Edinburgh City Libraries. By the 1990's library automation had arrived and we were using the Talis Library Management System for cataloguing. In those days we were fortunate to have a team of four professional cataloguers (all of us Chartered Librarians and we were also paid up members of The Library Association, as it was called then). We used UKMARC for the online description (and AACR2 for the rules), the Library of Congress Classification Scheme, and Library of Congress Subject Headings. I recall we catalogued a really wide range of material in addition to standard book material- government publications, ephemeral material (especially for local history) audio -visual materials, maps and music CDs.

There was a lot happening on the professional front as well and we were encouraged by our head of section, Mabeth Curry, to attend the numerous meetings and events organised by the Scottish Library Association and specifically by the Cataloguing and Indexing Group in Scotland (CIGS). I certainly benefitted greatly from this exposure to professional activities and it would lead me to become heavily involved in CIG activities further down the line.

As I mentioned earlier, it was always at the back of my mind that maybe some day I might be able to return to an academic library. Thankfully my patience paid off and I moved south in 2001 to take up a position as Non-book Materials Cataloguer at the Bodleian Library, University of Oxford. As we moved increasingly into the electronic age I had taken a keen interest in electronic resources. As a member of the English Cataloguing Section I also supervised and trained cataloguers. Based in the New Bodleian in Broad Street next to Blackwell's Bookshop it was a marvellous place to work. It was also a pleasure to have evening and Saturday duties in the various reading rooms of the Bodleian, especially the Radcliffe Camera that was always my favourite place there.

During this time in Oxford I joined the CIG Committee, eventually becoming the Book Review Editor for its journal, *Catalogue & Index*. The CIG played a vital part in promoting cataloguing as a professional activity. We arranged many workshops and training events as well as annual conferences (alternately on our own or as part of Umbrella).

While working in Edinburgh I had been aware of a fair amount of co-operation amongst different types of libraries there-the public library, the university libraries (Edinburgh, Heriot- Watt and Napier) plus of course the National Library of Scotland. So it was the same at the Bodleian which as a Legal Deposit Library, worked closely with the other Legal Deposit libraries – the British Library, the National Library of Wales, the National Library of Scotland, the University of Cambridge and Trinity College, Dublin. We had the Shared Cataloguing Programme (SCP) which the six LD libraries contributed to, each having responsibility for titles beginning with certain letters of the alphabet.

Cataloguing rules needed to adapt to the new challenges of what was becoming an increasingly digital environment. The CILIP/BL Committee on AACR was to become the CILIP/BL Committee on RDA as a new standard for creating bibliographic metadata was born- Resource Description and Access (RDA). I had joined this committee during my time at Oxford and it was an exciting time to be involved with RDA during its infancy and also then with its development over the coming years.

My own career continued to progress mean time as I was now Team Leader of the Bibliographic Maintenance and Authority Control Section in the Bodleian. Our team carried out a wide range of automated catalogue maintenance as well as loading the file of the Library of Congress authority records into the OLIS authority file on a weekly basis.

By the time the first drafts of RDA were issued in 2006 I had returned to Scotland, mainly for family reasons, to take up a post at the National Library of Scotland. As a joint team leader of the Metadata Team there, my co-manager Elaine Smith and I were directly involved in the planning and implementation of RDA at NLS.

This was a time of great change and much innovation in the cataloguing world and my ten and a half years was an exhilarating time. As well as being on the CIG Committee and the CILIP/BP Committee, I became a member of the editorial board of Cataloguing & Classification Quarterly from 2008. I became even more involved with RDA by becoming Chair of the CILIP/BL Committee on RDA in 2013, I found it immensely rewarding to be involved with the professional committees and to help promote cataloguing in the UK . I really admired the work done by advocates such as Alan Danskin from the British Library, Hugh Taylor from the University of Cambridge, Ann Chapman from the University of Bath and Gordon Dunsire (the UK representative on the Joint Steering Committee for Development of RDA).

I have always believed that you never stop acquiring new skills as a cataloguer. Even late on in my career I was fortunate to be sent to the Library of Congress in Washington DC in September 2010 for a five day course in NACO (Name Authority Control).

As much as I have always enjoyed the intricacies of descriptive cataloguing to be able to construct and submit names and subject headings to LC brought me even more satisfaction during my final years working at NLS. I think my main claim to fame might be the fact I successfully submitted the heading Oor Wullie (Fictional character) to the Library of Congress File!

When I took early retirement from the NLS at the end of 2016, I had witnessed a huge amount of change and progress in the world of cataloguing during the previous 36 years. I also have no doubt that cataloguing will continue to develop over the coming years.

Cataloguing has come a long way during my working life. Card, sheaf, guard book and microfiche catalogues are now dusty relics of a bygone age. Catalogue records are now readily available online at the touch of a button. As for cataloguing rules, they too have had to keep pace with the digital world. Print volumes of AACR and AACR2 are long gone and in their place is the digital RDA. Library management systems have also had to keep abreast of the digital environment to meet the requirements of the modern day library and its users. It has been quite nostalgic looking back at cataloguing during this period. I have a lot of happy memories of former colleagues both in the libraries I worked in and also on the committees I have served on. I feel honoured to be asked to contribute something to the 200th issue of *Catalogue & Index*. I salute you on reaching this impressive milestone.

Neil T. Nicholson, former Reviews Editor of Catalogue & Index

When the editors asked me to write something on my time as Chair of CIG, I felt flattered, but also flummoxed. I was made redundant by my employer over four years ago and retired at that point. On getting Karen's email I was pretty sure I had not kept any of the several Lever Arch files of CIG stuff that had been in my office. On looking in my extensive filing system (read: room full of junk) I was proved right. Karen tells me that I was Chair in 2007 and from the few documents I could find, I think I did a year or two more. But, to be honest, I can recall very little. When I said as much to Karen, she generously allowed me to write more generally about my time on the CIG committee.

Having started as a cataloguer before the (Falkland's) war and attended one CIG conference, I was tapped on the shoulder by the then secretary, in the middle of Trafalgar Square during a CND demo, and asked if I would like to be on the committee. Having little idea of what it would mean, I said yes. I was duly nominated, and elected unopposed, and did not leave till sometime in the present century. Term limits had not been thought of back then.

Having been on the committee for that long it may be no surprise that I made it to chair – if only on the principle of Buggins' turn. However, I don't really like being a passive member of an organisation if there is a way I can be active. That's why I did not remain a member of the Campaign for Real Ale while I was working – I could spend too little time properly surveying the beers of Essex.

But in CIG I did serve an apprenticeship. I think my first major task was to organise the annual conference. It was at the Norbreck Castle hotel in Blackpool and 100 cataloguers were sharing the place with 300 plus country & western enthusiasts. The registration desks were either side of the front door and we amused ourselves guessing if the next people walking up the long driveway, were interested in Melvil Dewey or Johnny Cash! My work colleague whose room was directly above the ballroom was not happy at breakfast!

Later, I served on the DDC committee and the BIC Bibliographic Standards committee, as well as SCOOP (The Standing Committee in Official Publications) of which I also became chair. After all that, you become someone who knows many of the secrets and history of the Group (or at least its committee) so perhaps being Vice-chair and then Chair was not a surprise.

I am pleased to say that CIG was always up with, or ahead of the curve of, the digital agenda – I guess in part because MARC was well embedded. I can remember a conference in the eighties where a speaker introduced us to Ted Nelson – who I see is credited with inventing the word 'hypertext' and whose catch phrase was 'everything is deeply intertwingled.' This was before we had a real idea of what was to come but it served as a good introduction to some of the principles of connectivity etc.

By the time I took up the Chair we had got to the internet, and RDA was already established in the 'Standards Forum' which was part of every conference. So too was the E4Libraries project, and conference agendas included words / phrases like 'portal', 'multimedia', and 'distributed environments'.

No particular thanks to me but I believe that being on top of these issues, and being involved in the development and maintenance of standards, are some of the reasons that enabled CIG to maintain its membership and sector coverage. By the time I was chair, the public library sector where I was employed, had very few working cataloguers – I think there were two or three on the committee by that time though not many more in the wild. But things like the E4Libraries project and the development of MARC21 required at least some public librarians to remain interested. And the spread of RDA, as well as institutional depositories (another subject well covered by CIG) was bound to be of interest to those in academic institutions and specialist libraries.

I don't recall having any specific aims when I became chair. Recently I was in an online seminar when three suggestions as to the importance of the role of a good chair were posted:

- Help steer discussions and keep debates on topic
- Allow time for all topics to be discussed appreciating their relative importance
- Be sufficiently knowledgeable to challenge any views presented.

Keeping meetings on track is something I think I am good at – possibly a little too authoritarian on occasion – but that includes ensuring that after discussion, if a decision has been made, we know who will carry it out. And if a decision has not been made, why did we discuss it or should we have done so!

The bullet points above miss aspects of good chairing which are broader than what happens in the meeting. There is a role to ensure that the general direction of the committee is on track and moving forward. Are we addressing the issues of concern to the community we represent? Are we doing practical things in those areas? In a discipline like cataloguing there is so much practical progress to be made and followed all the time. In addition, it is important to ensure that people coming on to the committee find it useful and within their capacity, and in doing so, to try and ensure some succession planning. In writing this piece I looked at the CIG pages on CILIP's website and noted that only one or maybe two of the current committee are people who were on (or coming on) when I eventually stepped down. But looking at recent AGM minutes this has been a (relatively) gradual turnover and the current members clearly have a range of experience and knowledge – which is what we should be trying to encourage.

I have followed at a distance the progress of the cataloguing ethics charter. It was a privilege to be involved in CIG for so many years and in Trafalgar Square all that time ago, I would never have imagined being the chair. That day I saw the banner of Historians against the Bomb which read 'We demand a constant supply of history'. It is CIG's role to ensure that those who want to access that supply can continue to do so properly.

Andrew Coburn, former Chair of CIG

Is there anything particularly memorable from your time as Chair?

My memory is not the most reliable guide, but according to my records, I replaced Brian Holt as the British Library' representative on the committee in 2001 and I succeeded Sue Brown as Chair the following year. I served continuously on the committee in various capacities for around 15 years. This was only possible because previous terms were zeroed every time CILIP changed the regulations governing SIGs. This happened quite a lot.

My most memorable moments as Chair are associated with the CIG and Umbrella Conferences. During my tenures as Chair I was fortunate to have the support of colleagues on the committee who were able to find excellent venues and develop strong programmes. I was particularly pleased that the conference began to attract delegates and speakers from overseas and I particularly enjoyed meeting Patrick Le Boeuf, who spoke about FRBR (Functional Requirements for Bibliographic Records) at our Bath conference in 2004. Another memorable incident came at Umbrella when a delegate (who was not a cataloguer) approached me following discussion of forthcoming MARC changes at the Bibliographic Standards Forum, to complain that she had not understood a word of the discussions. This made its way into CILIP's appraisal of our session; but if not at a LIS conference session specifically about bibliographic standards, where should professional cataloguers discuss their professional interests?

How would you encourage others to volunteer for the position of Chair, or one of the other officer roles?

I was reluctant to join the CIG committee, but I was pushed into it by my manager at the time, and I certainly didn't expect to be Chair a year later, or to serve on the committee for 15 years. But you learn, you adapt, you bring things back to your day job, and make contacts and friendships that broaden your horizons. You discover that you can make a difference. Getting involved on the committee as a member or an officer provides opportunities that you may not have in the day job.

What was your job at the time, and has this changed since your term as Chair?

That's a good question! At the time of my first term as Chair I think my title was Manager of Cataloguing [team] D, covering authority control, retrospective conversion, catalogue maintenance and UKMARC, but in practice much of my time was directed to the project to prepare the British Library's UKMARC data for migration from multiple collection specific catalogues to an integrated MARC 21 catalogue. Now, as Collection Metadata Standards Manager, I am still working to break down the remaining metadata silos that inhibit coherent and comprehensive discovery of our collection. Plus ça change…

Do you feel your time on the CIG committee has been of benefit to your career or professional standing?

I cannot honestly say whether my career at the British Library would have been significantly different had I not served on the committee, but it would certainly have been less interesting and rewarding. Involvement with CIG gave me a broader perspective on the profession and the role and scope of work carried out by cataloguers in other institutions.

Did you enjoy your time as Chair?

I did. The committee has always been very collegiate and convivial. Throughout my time on the committee we maintained a tradition of repairing to the Jeremy Bentham after the meeting for a couple of drinks before catching trains home. I think the venue may have changed, but hopefully the practice remains.

Do you have any comments about the role of the committee within our community of practice?

I always worried that there was more that we should be doing, particularly when other sources of professional training declined and eventually disappeared. Nevertheless, I never felt that CIG should or could step into the breach. The committee depends on volunteers, who all have full time jobs and other commitments. We could play an enabling role, but I did not think we could provide professional training. Nevertheless, through C&I, our conferences and other events CIG provided opportunities for CPD. In recent years the British Library has worked in concert with CIG to provide training courses on bibliographic standards, including RDA and LCSH.

Looking forward what do you think are the big issues we will be dealing with within the cataloguing community?

All cataloguers have been aware for years of the biases inherent in many of our standards, including DDC, LCSH and AACR - In a world in which metadata is shared more widely and disseminated to more diverse audiences, it is appropriate that we look at how these standards, on which we have relied for efficiency and economy, can also alienate audiences and even turn members of the community from the profession. CILIP led the process to open the governance and editorial structures of *RDA: Resource Description and Access* to global participation. The RDA Board has set the RDA Steering Committee the strategic objective of internationalising RDA instructions. This objective is being implemented in the context of the 3R project.

A feature of AACR2 was Anglo-American exceptionalism; rules that gave preferential treatment to anglophone cataloguing practices and terminology. This was not inappropriate to AACR2 - its biases were explicitly stated in the title, but it made the rules difficult for other communities to use. Many of the issues related to the way in which controlled access points are formed. The current version of RDA has introduced options and exceptions to handle more serious issues, such as the option to include or omit initial articles from the Preferred title for the work, but in 3R, RSC takes this much further. It is proposed that the instructions on building access points are removed from the RDA text. RDA will include guidance on which elements are required but community guidance on the order of elements and choice of controlled vocabularies for terms, such as books of the bible, will be the responsibility of the communities, such as the Program for Cooperative Cataloging (PCC). RDA will provide the hooks from which those communities can hang their own guidelines.

Implementation of the IFLA Library Reference Model (LRM) and the commitment to make RDA linked data compliant underpin initiatives to meet the needs of diverse audiences. The introduction of Timespan and Place entities provides the infrastructure for contextualising resources more accurately and Nomen (or entification of names) will enable any entity to be referenced independently of language, script, or vocabulary.

There are still issues to be resolved and recent controversies have highlighted continuing difficulties with controlled vocabularies, including LCSH. It has been good to see MDG and its international peers taking the lead in drafting a code of ethics for cataloguers. To be effective such a code will have to be instantiated in local practices. The cataloguing and broader metadata community have an important role to play in decolonising collections. This is not only a question of being honest about how collections were acquired, but of reviewing the legacies of our cataloguing practices and terminologies that are not appropriate to the 21st century. This should not be a case of erasing the past, but of explaining it and contextualising it honestly and in language that is acceptable to our diverse audiences. It is a great challenge but also our duty.

Alan Danskin, former Chair of CIG

Whilst excitement might not be the first word that springs to mind when reflecting on cataloguing, the period between 2011 and 2013 when I served as Chair of CIG was certainly a time of many changes and developments. These were changes and developments that directly impacted upon the work of CIG members and colleagues alike within libraries. At the time I became Chair I was managing a dynamic, highly skilled and well staffed Data Services department at a university library. The work of CIG was a natural compliment to my day-to-day activities.

In this article I reflect upon my time as Chair of CIG and what I believe to have been our main achievements during this time. These are achievement that could not have been delivered alone but were the result of the hard-working and committed colleagues on the CIG committee. I conclude with a few thoughts on what the future might hold and what it has held for me since stepping down from CIG.

CIG and the CIG Committee

One of the key benefits of CIG is a membership that has always been a broad church, representing a wide array of individuals working across widely different environments. The uniting factor, it seems to me, is a concern for getting the right information in the right format to the right person in the right place at the right time. Access to information, and it's transformation into knowledge, is greatly advanced by accurate and appropriate description.

Working as part of a committee has many advantages, particularly when everyone involved also has a day job. CIG committee members are all volunteers who give freely of their time and are willing to turn their hand to whatever needs to be done. Participation is a great way for individuals to develop themselves personally and professionally and I would encourage anyone interested to get involved whenever opportunities arise.

CIG achieved a huge amount during the time I was Chair and this is as a result of work that I cannot take the credit for. Rather, the committee was central in taking work forward ideas and increasing engagement with members and libraries more widely. CIG benefited from a highly motivated, enthusiastic and knowledgeable committee as, I am sure, it still does today. My committee contemporaries were highly committed and capable individuals well equipped in developing and running with ideas which took the work of CIG forward in support of our members. To each of these individuals, and they know who they are if they are reading this, I offer my thanks.

Key achievements

The period 2011 to 2013 in the life of cataloguing and cataloguers can best be summarised in three letters: RDA. The lead up to, the adoption of, and the consequences of the implementation of Resource Description and Access was the major topic of concern. This is a topic that I would observe still reverberates today.

CIG worked hard in preparing the ground for the introduction of RDA amongst our members and beyond within the UK library community. Letting fellow catalogues know in advance what they needed to know, giving them support, training and advice, and addressing collective questions and concerns very quickly became the major issue for CIG. With the benefit of hindsight it is clear that the work of CIG on RDA was both a significant achievement to be celebrated but also a key way of connecting and re-connecting the group to the work of members and non-members alike.

RDA was a predominant theme at a hugely successful CIG conference in 2012. That the conference was a huge success will come as no surprise to anyone who has been fortunate enough to attend a CIG conference but it was the outcome of a huge amount of work by committee colleagues and an excellent programme. For those not able to attend the conference CIG was able to support them in other ways. Making conference presentations available online was a great substitute for attendance. Additionally, conference papers were published in *Catalogue & Index*.

With some degree of distance it can be easy to forget that RDA was the most significant factor, and cause for potentially the greatest anxiety at the time. Its introduction was a huge event for cataloguers which impacted upon so much of the day-to-day work of individuals. And CIG was a voice of, hopefully, sane and measured leadership for cataloguers
.
In response to the perceived need of members, CIG moved into the delivery of training. This was delivered through the creation of a series of e-mail based e-forums enabling practising cataloguers to debate and exchange ideas with colleagues at other institutions whilst still being in work. Face-to-face training was developed and delivered extremely successfully by committee colleagues in the 'FRBR for the Terrified' course that ran in a number of locations across the UK to a sizeable number of cataloguers. This course was instrumental in giving cataloguers a grounding in FRBR needed to understand and interpret RDA.

Group communications

Catalogue & Index has always been a central way of sharing information with the CIG membership. A key concern during my time as Chair was how the journal could transition to Open Access. The committee were all in agreement that this should be achieved, however there were serious financial implications that needed to be addressed. Most notable of these was a concern that if making the journal freely available online would this lead to a reduction in membership of the group and, thus, a loss of invaluable income that enables the group to operate. In reality there were two separate but linked issues involved. Firstly, making *C&I* available full-text on the web and, secondly, a transition to a full OA journal. It is pleasing to see that the latter has been achieved and that *C&I* continues to evolve as publishing also evolves and that CIG membership does not appear to have been impacted.

In early 2012 CIG took its first tentative steps in to the world of social media, setting up what is now a highly successful Twitter account (@cilipcig [now @CilipMDG]) and it is a pleasure to see that this is now a lively, active account bringing real value to members and beyond.

Looking forward

Over recent years it has been heartening to see the intensification of debate around the place of cataloguing and metadata creation in constructing and enforcing the grand narratives of accepted dogma. Metadata workers are right to identify that they are complicit in the creation and dissemination of ideas and ideologies to which they may not subscribe. Descriptive practices and the assigning of classifications and vocabularies are not neutral acts. Cataloguing rules, classification schemes, thesauri, and cataloguer's judgement are not and should not be viewed as rational and objectives. The metadata worker is an active participant in creating ideas. Every attempt to describe and assign external schema to information constructs as much as it facilitates. There has been much notable and important work over the past twenty years and more addressing these issues. From recognising the inherent bias and empty spaces in classification schemes and thesauri that directly contribute to the discrimination against, and marginalisation of, individuals and groups and their exclusion within society to the work on decolonising descriptive practices and collections. It is laudable to see this important reflective turn in the work of cataloguing and cataloguers. Long may it continue.

There is nothing more satisfying when stepping down from the role Chair of CIG than seeing how the work of both the committee and the group continues to grow from strength to strength. Libraries cannot and should not stand still and the on-going development of CIG and the transition to the new Metadata and Discovery Group is, as outside observer, a sign of growth and advancement. Success iterations of the committee have ensured that a national voice for all working in and with metadata is heard and continues to be heard. As a past Chair I wish the committee continued success in this next stage of the group's evolution.

On a personal level I ceased my active involvement with CIG when I moved into senior management within university libraries. As I no longer had direct day-to-day responsibility for metadata activities it was right that I stepped down at the end of my time as Chair. I was happy to pass on the honour of serving to those excellent colleagues who succeeded me in the role and it is heartening to see that CIG has gone from success to success, now reflected in the new name and branding and in a renewed vision for the group. In my role now as a Director with responsibility for libraries, museums, archives and special collections, I hope that I haven't forgotten the lessons that I learned during my time with CIG and my involvement with metadata generally. My career has taken me away from metadata wrangling and, if I am honest, I don't miss it. But I know and recognise the importance of managing and facilitating access to information so that our users can transform it into the knowledge they need to achieve their own goals.

Stuart Hunt, former chair of CIG

"*If you can't fly, then run. If you can't run, then walk. If you can't walk, then crawl. But whatever you do, you have to keep moving forward*" -Martin Luther King Jr.

In January 2019 I became Chair of the *Cataloguing & Indexing Group* but in December I will be stepping down as Chair of the *Metadata & Discovery Group*.

So that is the first change that I need to talk about – a new name and a new remit which we hope will keep the Group moving forward and in doing so advance the cause of our membership and the wider community of practice. I wrote an article about our name change for a previous issue of C&I *What's in a name? From CIG to MDG to CPD* (No. 198, March 2020) but I'd like to pick out some threads to repeat here.

The 2018 Membership survey had revealed certain trends which anecdotally we were aware of or had personal experience of i.e. Metadata loomed large in our job titles; that our work was identified as an essential component for resource discovery; that cataloguers and metadata managers work in libraries but also museums, archives, galleries, for myriad organisations including publishers and also the companies that sell us resources, systems and bibliographic records and metadata.

By asking the membership to confirm the new name we were not diminishing the value of cataloguing, indexing or classification but rather acknowledging that technical practice has evolved to meet the challenges of facilitating search and discovery in an online world; and one in which aggregated data looms large. We are a broad church and want and need to be inclusive and immediately identifiable as THE Group for anyone who creates, shares, enriches and maintains metadata. How else are we to attract members; provide support advocacy and training; and enlist volunteers to serve on committee to deliver this support?

Happily the membership agreed and since October 2019 we have been busy working to complete the cosmetic rebrand – unfortunately COVID-19 prevented both CILIP and us from completing it in time for our conference – but this is really just the start.

The next stage is to work with CILIP to make the mission statement and action plan a reality. We must partner widely with both our library and information schools and training providers to increase access to training and CPD for those who are currently cataloguing and managing metadata; and those who want to either upskill or begin their journey to competence and excellence in technical practice.

A small example of what we can do in partnership was the screening of the 'Change the Subject' documentary in February this year organised by Dr Alison Hicks of UCL Department of Information Studies but with sponsorship by several other library schools and also MDG. Our small financial contribution enabled our members to watch the screening and the Panel discussion live.

I feel sure that Dr Diane Pennington, Senior Lecturer Department of Computer & Information Studies at the University of Strathclyde, and the next Chair of MDG, will be able to use her experience and networks to strengthen the links between LIS education and practice. There really needs to be a structured pathway which gives people the support to move on from education to practice; or a starting point if they are attracted to cataloguing and metadata as a career.

Importantly employers (or prospective employers) need this guidance as well so that they know what a technical practitioner does; how they add value to an organisation; and know how to help staff develop.

One of the ideas that the Group has advocated is the design of a specialist chartership route for technical practitioners. This would involve building a system of targeted education, training and CPD opportunities for the elements of the CILIP Professional Knowledge and Skills Base (PKSB) that dominate technical practice. CLIP have already worked the two other special interest groups to create chartership routes i.e. Knowledge & Information Management Group and the Health Libraries Group. Perhaps MDG can be next.

Another big development from my perspective has been the growth of regional cataloguing and metadata management special interest groups during the last two years. MDG already has formal representation on Committee from CIG Scotland and the Cataloguers in Wales Group. But there are other SIGs across the UK. WHELF (Welsh Higher Education Libraries Forum) Cataloguers Group and SCURL (Scottish Confederation of University & Research Libraries) Collections Management & Metadata Group. Joined in the last 18 months by the Mercian Metadata Group and the Great Northern Collaboration Content Group; and just this summer the SUPC & LUPC (South East & London) Metadata & Discovery Group.

Networking, advocacy, training, and collaborative working – the lynchpins for a robust and resilient workforce. We are lucky enough to have members from each of these groups on the MDG committee although initially this has been by a happy co-incidence. I would like to see the links between the regional SIGs and MDG committee formalised so that we can build on the collaborative work that we started in 2019 E.g. the successful rolling out of the *Future of Cataloguing* discussions, initiated by CIGS and run in Edinburgh, to audiences in Birmingham and London; and the UKCoR (UK Committee on RDA) workshop on RDA initially run in Edinburgh and then rolled out to Birmingham.

There are tremendous opportunities to share expertise and resources to ensure that events and training become accessible to MDG members and the wider community of practice regardless of geographical location in the UK.

That any of this has been possible at all – from the Group rebrand to the events both physical and online and the highly pertinent and timely articles published in *C&I* – is entirely a product of the outstanding dedication and energy of the MDG committee and the organisations and individuals that we have partnered with to deliver all of this.

It has truly been a privilege to work with you all!

I also want to pay tribute to all the preceding Chairs of CIG and their hardworking committees and to thank our loyal membership. Your work and commitment have kept the Group moving forward and enabled the present Committee to maintain the upward trajectory.

And would I recommend getting involved with either MDG or regional special interest groups?

Definitely.

Everyone has something to offer and every contribution is important to the Group, to you and to the Profession.

Jane Daniels, Chair of CIG/MDG 2019-2020

Forty Years a Cataloguer

Lesley Whyte, Managing Director, BDS — interviewed by John Hudson

In this interview, Lesley Whyte, one of the major figures to influence methodology relating to the production and distribution of metadata for libraries in the last 25 years, reflects on how her ideas came to be formed and how she and her company, Bibliographic Data Services, have transformed the practical, day to day use of metadata and applying the standards that govern them.

What was your first experience of cataloguing?

September 1980. Fresh from university, clad in the white laboratory-style coat that the library staff wore, I entered the cataloguing department at Glasgow University Library. I was a SCONUL trainee, undertaking a year's intensive training in all the departments of the library, before going on to University College London to embark on the post-graduate course in Library and Information Studies.

I had been working in the library for a few weeks, and had already been advised by my colleagues that cataloguing was "difficult", and that only people who were slightly strange wanted to do it, but I quickly found that I had to be one of those strange people, because it appealed to the way my brain worked. In those days we were filling in forms, coding the information that was entered by specialist operators, and then contributed to SCOLCAP, a consortium of libraries based in Scotland. For me, this was as exciting as working at NASA or Bletchley Park. I delighted in finding the perfect way to express the description and content of a work.

This must have been at a time when cataloguing was transitioning towards new models based on technology. You must have seen this happening.

At Glasgow, we had three forms of catalogue. The guard book catalogue was a series of huge books with catalogue entries written or typed onto slips of paper that were glued onto the pages. Obviously, the entries were not always in strict alphabetical order, which was challenging if you were searching for something, and to use old terminology, there was only a main entry.

This had been superseded by the sheaf catalogue, a variant of the card catalogue, which allowed multiple access points, but for a collection as large as Glasgow's the sheaf catalogue in the main hall dominated the ground floor of the library, and if you withdrew a book from the collection you had to remember to remove all the access points and all of the entries from both the main catalogue and the catalogue on the floor where the book was actually situated.

The third catalogue was a microfiche catalogue, produced by SCOLCAP. If you were lucky when cataloguing, you could add your holdings to a record already created by one of the other contributors, but otherwise you had to create an original record. Even though microfiche entries were necessarily short, my imagination couldn't help racing ahead, for the prospect of describing works in much greater detail was there, and this offered so many possibilities for resource discovery.

A new and exciting factor had come into the mix – computers were now being used in libraries to expose the collections in a way that had not been previously possible. Furthermore, union catalogues were available, allowing collaboration and the potential to find a book in another library, if it was not available in your own.

So, yes, cataloguing was changing before my eyes and I felt excited to be part of it.

How did this influence what you did next?

At UCL, one of my favourite parts of the course was "cat and class", which only reinforced the fact that I was strange, since most of my fellow students groaned at the thought, but we were taught by the legendary Ia McIlwaine, and even now, I refer to some of the principles of classification and subject indexing that she taught me.

My first professional job, which really determined the rest of my career, was as the Editor of the University of London's shared catalogue. The University of London is a federal university, and at that time, twelve institutions collaborated in a shared, automated catalogue, which in turn, fed the shared circulation system. I learned all the principles that are so important to cataloguers – accuracy, attention to detail, adherence to standards and consistency between entries. This was baptism by fire, because cataloguers are perfectionists and can be opinionated people, so if I was telling them that their interpretation of AACR2 or the MARC manual was flawed, I had to be very sure of my facts.

To hone my skills, I was also assigned to work two days per week in the Latin American Library at Senate House, where I was based, cataloguing Spanish and Portuguese material. In this job, I made a new discovery that all cataloguers understand – the joy of learning about new subjects. Sometimes even identifying the title of the work was tricky, but I was also learning about places I had never heard of, political movements, people and poets that were all new to me.

I was also exposed to the concept of specialised classification to suit the collection. Senate House Library used Bliss, a faceted classification scheme. While admiring the way that notation could be built to express the subject of the book very succinctly, I couldn't help wondering, in this world of nascent library automation, if all this effort could be justified, when often the British Library or Library of Congress had already classified the book using DDC or LCC?

It sounds as if you were already forming the principles that have gone on to make your work in this area so successful. **How did these experiences influence your next career move?**

My next job was as Head of Technical Services at King's College London. We had about thirty subject librarians and library assistants involved in the cataloguing process. Some were very good at cataloguing, others were very bad, but the reason work was distributed in this way was because the subject specialists assigned individual classifications to the book for their subject area. So if we had five copies of a book in the library in different locations, it was quite possible that there would be five different classifications. While I understood that the subject specialist's objective was to make the book fit with the collection in their area of the library, it seemed like a lot of duplication of effort.

While at King's, I also became involved in one of the great activities of major libraries in the last decades of the twentieth century – dismantling the work of generations, by automating the catalogue. The benefits of this were manifest to me – multiple access points, longer entries, more cross referencing. Automation offered a whole new range of possibilities to the student and the researcher. All my reflections on my experience so far, all the ideas that had been forming were beginning to come together in the world around me and, even then, I was aware of the need to take this work further, to create a practical methodology to simplify the process of creating the catalogue and thereby liberate it, free it from the pitfalls of inconsistency and eccentricity.

Was there a Eureka moment when it all came together?

During my time at King's, I was fortunate to secure a sabbatical post at the Lucy Scribner Library at Skidmore College, Saratoga Springs, New York. I was exposed to the power of shared cataloguing, using what became known as WorldCat. In the University of London we did lots of original cataloguing, and always had backlogs, depriving students of access to the new books they needed. Gifts and donations stretched uncatalogued along metres and metres of corridors.

At Skidmore, we rarely had to do any original cataloguing, as most was derived from the Library of Congress files. Just in case I missed doing original cataloguing, my colleagues were very keen to hand over a backlog they had developed, for a new format of music called a CD, since nobody knew what to do with them. When I left Skidmore, all the CDs were catalogued.

The importance of a single source of quality records made a huge impact on me. My time in Saratoga certainly crystalised my ideas.

Where did you go next?

Now I really wanted to put some of my new ideas into practice. So I decided to move back to Scotland, and went to work for a very enterprising library bookseller called Tom Farries and his company, T C Farries & Co Limited. I realised that what we now know as metadata was going to be an even more important force in libraries, and I wanted to introduce positive change into the process.

Libraries, especially public libraries, driven by the need to introduce efficiencies and save staff costs, were experimenting with selection from information rather than through physical inspection of books, and were moving towards shelf-ready services. This type of innovation was exciting to me, because we could develop services that really helped libraries streamline their workflows. The business perspective allows one to be free to improve on what has gone before.

So, doing business added a perspective to your thinking about real-world cataloguing?

Definitely. Business forces a strategic approach. You have to be efficient. And such necessity, when managed correctly, benefits everyone and everything within the supply chain.

I can see that we have two strands merging in your experience as an innovative cataloguer and as a practical business woman. I guess what happens next is what is known to so many as BDS.

There was still duplication of effort and inefficiency, both within my own company and between competing library suppliers. So, yes, the culmination of my library experience and my business experience lead me to set up BDS with my colleague, Eric Green, in 1994. Eric and I had already worked together for five years, and we had a shared vision of services we could offer to assist libraries to work more efficiently, for the benefit of staff and users alike. We wanted to offer a model where expert practitioners could focus on creating metadata that could be used many times by all the different players in the supply chain, for universal advantage.

Can you tell us about the factors have influenced the formation and development at BDS?

There are a number of factors that have always governed our thinking in the shaping and delivery of services to the library community. The first is that library-quality metadata is governed by standards, and if we at BDS can meet those standards, and use them to describe the content – be it books, physical or digital, audio or video files or any other format that a library uses, then libraries all over the world can use the record without need for further modification. We believe in the value of standards, and I have encouraged colleagues to participate on national and international committees to contribute to the maintenance and development of those standards.

Another principle that I believe in is that if you find the right people, and give them the correct tools and environment to do the job, you'll get great results. We have invested heavily in training, and even more heavily in technology, writing systems to make the process of creating metadata easy, and everyone at BDS can play a part in that process. This is what I call the BDS Method.

The realisation of all those insights you accrued all those years before?

Exactly. All that experience and reflection on it has gone to build the BDS Method.

Our productivity levels have been benchmarked with major institutions in the world, and we have been found to be many times more effective. It is the result of the right technology, combined with the expertise of our team.

So, the system works?

It's proven to do so, yes.

My overriding objective in my forty years as a cataloguer, has been to make a difference to my profession. I wanted to make processes easier, and more effective, and I wanted to drive down the cost of metadata creation by reducing duplication of effort, and reducing backlogs, so that libraries derive maximum value from their collections, making stock available at the optimum time for the benefit of their users. Our mission at BDS is to provide cataloguers with the raw material that they can use for resource discovery, or to select, acquire and add the item to their stock.

What do you see as the next developments in the world of metadata?

Oh, so many exciting possibilities. Publishers are producing content in many different formats, and for all of us, particularly after this enforced period of lockdown, we are relying more and more on digital content. Digital content is not as static as a printed book, so we need to ensure that the description of the item is current.

At BDS we work very closely with publishers, and they are releasing more and more rich content about the works they publish. I'd like libraries to be able to access this content and use it to promote their collections. It is remarkable to think that when I started work, the first thing we did when we accessioned a new book was to remove the jacket. All the information that the publisher thought would attract readers was taken away. Now extended content such as cover images is seen as an asset to be exploited. This information, linked to the catalogue record, is set to grow and the possibilities are huge, extending accessibility and opening up information retrieval in ways to suit everybody.

The card catalogue meant that the only information you had available for the item was confined to the physical space on the card. Now we have APIs linking to various sources, both internal and external, providing a wealth of information about the work or related works.

Despite being the Managing Director of a company that employs over 60 people, you still seem to be engaged with the nuts and bolts of cataloguing…

I don't work "at the tools" any more, but my colleagues keep me informed on new ways of thinking and new ways to describe and access information. There are always new subjects to be described – a year ago, nobody had heard of COVID-19 – so classification systems and thesauri need to be maintained.

We've moved from a single point of access to a work, one where you almost had to know in advance that it existed, to one where the potential for resource discovery is unlimited. Every word in a record can be indexed, every information code analysed and content, whether text, video or audio is available to enhance the experience of searching for the right resource. Manifestations of a work can be linked, formats have proliferated and works can be updated in real time. We can share records with libraries all over the world. But these objectives can only be achieved if robust principles govern the recording of knowledge. Cataloguing rules, standards and identifiers are more important than ever if we are going to make sense of this infinite quantity of content.

Moving forward, libraries, as always, are probably going to have to serve the increasingly sophisticated needs of their users by doing more with less. The job of the librarian, right book, right reader is harder than ever, so the need for shared, accurate data is paramount.

And so, I guess, we come back to your method, what you call The BDS Method?

It is the culmination of everything I have learned in my working life, from my first day in the cataloguing department at Glasgow University. I owe so much to my teachers and mentors,

Dr Marlene Clayton
Colin Galloway
Professor Ia McIlwaine
Maureen Pettifer
Patricia Noble.

I hope I have added a little to the library of cataloguing expertise they themselves helped to build.

Lesley Whyte, Managing Director, BDS

The WHELF Cataloguing / Metadata Group: the growth of a cataloguing consortium, from small beginnings to big ambitions

Helen Griffiths , Library Cataloguer, Royal Welsh College of Music and Drama, Cardiff.

The project

It was in June 2012, following the success of a bid for funding from the Joint Information Systems Committee (JISC) that the Wales Higher Education Libraries Forum (WHELF)[1] began an ambitious project.[2] The Higher Education landscape across Wales was changing. The Welsh Government was driving forward its vision for a more collaborative sector. It's 2012-16 strategy '*Libraries inspire: the strategic development framework for Welsh Libraries 2012-16',* talked about finding *"innovative, sustainable and collaborative models of delivery*."[3] Institutions were merging and partnership projects were encouraged. WHELF already recognised the potential benefits of working together across the sector and had been doing so in various ways since it's inception in 1993. Building on this existing collaboration and inspired by technological advances emerging in data management, WHELF began a journey to source and implement a shared Library Management System (LMS) across all its member institutions. This was no small task, given that the membership consisted of 9 Universities, a National Library, a National Museum and would include the National Health Services Libraries in Wales. Starting with a feasibility study, what happened next was a pooling of library expertise across a Nation with a shared goal – to find a management system powerful and flexible enough to meet a wide and varied list of demands.

Working together

After a thorough procurement process, ExLibris' Alma and Primo products were chosen, and preparations began for implementation. It became clear at an early stage that cataloguing was one of the areas where there were opportunities for members to work together. One of the selling points for Alma and Primo was the potential for creating a shared catalogue. Each member institution has an Institution Zone to hold their local catalogue but in addition, there was the functionality to set up a Network Zone: an area that could store a shared catalogue of all WHELF members with each institution contributing their records to a central, searchable database that could be used for resource discovery, collection management and potentially, reciprocal access. The WHELF Steering Group listed a shared catalogue amongst its priorities when identifying collaboration opportunities and a Shared Cataloguing Task and Finish Group was proposed. The first 'cataloguer's symposium' was organised and was held in Swansea in November 2015.

Reservations

I was apprehensive about attending this meeting. I had been in post at the Royal Welsh College of Music and Drama (RWCMD) for 15 years but my journey as a Cataloguer had started as a part-time, post maternity leave position in 2009.

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1. "The Wales Higher Education Libraries Forum (WHELF) is a grouping of Chief Librarians and Directors of Information Services drawn from all the higher education institutions in Wales along with the National Library of Wales, Amgueddfa Cymru-National Museum Wales, Natural Resources Wales and the Open University in Wales." https://whelf.ac.uk/about [accessed 31 August 2020]

2. Owen, G and Dalling, J. (2016). WHELF Shared LMS: Delivering a shared library management system for Wales. SCONUL Focus, 65, 12-17. https://www.sconul.ac.uk/sites/default/files/documents/4_15.pdf [accessed 31 August 2020]

3. Welsh Government. (2012). Libraries Inspire: The strategic development framework for Welsh libraries 2012–16. https://libraries.wales/wp-content/uploads/2016/02/LibrariesInspireE.pdf [accessed 31 August 2020]

I had the good fortune to receive on-the-job training from an experienced colleague and despite my lack of formal cataloguing training, I became a fairly confident cataloguer. But RWCMD Library is small – around 60,000 items in total and I was acutely aware that I was working in a specialism. It has its own local classification scheme and all the cataloguing is done in-house (with many localised practices). Whilst our catalogue worked for us and our users, I was nervous about how it would fare when subjected to external scrutiny. I remember reading the agenda for the meeting and it began with a brief introduction from each participant focussing on key questions such as 'how many cataloguing staff do you have?' and 'do you have any subject specialisms?' So far so good, we had one cataloguer post and being a music and drama conservatoire, I was clear about our subject specialisms. However, the other questions related to vendor records, cataloguing enrichments and potential consortia subscriptions, some of which I had never heard of and none of which were possible on our limited budget. My brief introduction was going to be the shortest on record. I went, prepared to be intimidated and embarrassed but I couldn't have been more wrong. There was a refreshing openness and honesty from the start. I certainly wasn't the only institution with embarrassing legacy data and surprise, surprise, our self-regulated standard of MARC record was OK. Despite my initial reservations, I started to feel the benefits of belonging to this group and was excited for the work to begin.

Finding a common purpose

From this initial cross-institutional mapping exercise, we formed a picture of higher education cataloguing across Wales. As you would expect, every institution had its differences. The number of cataloguers for a start, varied greatly from less than a full post at some to 30+ at the National Library. Budgets were incomparable, with smaller institutions, like mine, unable to commit to big annual subscriptions. Subject areas also varied and although there was inevitable overlap, there were many collections that were unique and likewise, the skills developed to best manage these collections at a local level presented a great deal of opportunity for knowledge sharing across the consortium. There was a common purpose amongst all – to provide the best possible metadata for our users and the collaboration opportunities were exciting.

Appetite for cooperation

Early collaboration centred around the implementation of Alma and Primo. Beginning in 2015, early implementers included Aberystwyth University, The National Library of Wales and The University of South Wales. All other members were live with the new LMS by August 2016. By the time of our first meeting in Swansea, there was already an appetite for co-operation. Those who were using the new system were keen to share tips about their experience. We started looking at workflows and rationalising our locations, looking at areas where we could tidy our data before migration and identify any bulk changes we may want to employ. We identified areas where joint training would be useful, for example, setting up import profiles and normalisation rules. There were lots to talk about, and we needed a discussion platform where we could share documents and generally bounce ideas around when we weren't able to have face to face meetings. The logistics of meeting up regularly when we were spread out across Wales were prohibitive (even in the days before a global pandemic). The WHELF Steering Group set up a Yammer group for all its members and their sub-groups and the WHELF Cataloguing / Metadata Group that still exists today, was born.

Standards, training and networking

Three main themes formed the basis for the group discussions at this point: standards, training and networking. Yammer went a long way to facilitate the networking element and the benefits of having a dedicated social network were soon apparent. Fortunate to have an active membership, the group was soon using the platform to share ideas, ask for and offer help on specific issues and organise and advertise events.

Standards was a hot topic. From the off set of collaboration, it was recognised that any discussion around sharing records and developing a shared library catalogue would need to include metadata standards.

We needed to agree joint standards for catalogue records across the consortium and work began on this in March 2017, when the C/M group met for a workshop in the heart of Wales at Gregynog Hall,[4] near Newtown.

Figure 1: Gregynog Hall, Tregynon, Newtown, Wales.

This peaceful and inspirational house with its Grade 1 listed gardens in rural Wales is a longstanding favourite among Welsh University conference goers and it provided a calming back-drop for what was an intense but productive 2 days. We started with a review of sample records from across the institutions and shared our existing cataloguing standards templates. Guest speaker, Bernadette O'Reilly, Catalogue Support Librarian, Bodleian Library, shared with us her experience of working with OLIS (the Integrated Library System of the University of Oxford), offering advice and words of wisdom. We began the task of working through a bibliographic record, dissecting the elements and with each institution contributing thoughts on their institutional practices. By the end of the 2 days, we had the basis for agreeing standards. We had identified areas that needed further discussion, such as the use of local fields (9XX) and the use of local notes. We also agreed that a way forward was to create templates for different material types. With each institution contributing and focusing on their unique specialisms. This was an important milestone for us as a group as it gave us a tangible task.

To date, the consortium has agreed templates for a wide range of formats, including monograph; thesis; databases; DVDs; picture books; junior fiction; serials; graphic novels; electronic serials; electronic books; artists books and music.

Other benefits of the consortium have materialised in opportunities to contribute to National initiatives such as, the development of the National Bibliographical Knowledgebase (NBK) (JISC)[5] and almost all the WHELF member libraries now contribute their records to the Library Hub Discover database. More recently, WHELF has acted as a pilot group to test the JISC Compare Hub. A workshop in Aberystwyth, November 2019 launched the pilot and follow up sessions were held this Summer 2020 (via Zoom).[6]

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4. For more information about the Hall go to: http://www.gregynog.org/about-and-history/about-gregynog/ [accessed 31 August 2020]

5.A JISC R&D Project: https://www.jisc.ac.uk/rd/projects/national-bibliographic-knowledgebase [accessed 31 August 2020]

6. With online communication now a necessity due to COVID19.

Training has also featured high on the to-do list. This has ranged from local initiatives and knowledge sharing on topics such as normalisation rules, import profiles and copy cataloguing to specialist training days such as one held on cataloguing artists books. As a consortium we have also been able to share training costs and organise joint training events including sessions on MarcEdit and RDA (with training for the RDA redesign in our sights for 2021).

What next?

Enthused and encouraged by all it has achieved so far, the WHELF Cataloguing / Metadata Group are going from strength to strength. It still has lots of ideas and a healthy 'to-do list'. The group revised its action plan this year and identifying training needs to continue good practice and collaborative projects to enhance metadata standards still feature prominently on the agenda.[7] It endeavours to build on its established networks and increase its collaborative reach to other WHELF groups, such as WHEEL (Wales Higher Education Electronic Library) and Archives and Special Collections, recognising the need for quality data, regardless of format and striving for inclusion in vendor level conversations to influence data at the source. Other 'wish-list' projects include working with the Welsh language experts at the National Library to establish a NACO funnel project for Welsh language resources subject headings and following on from the work with the JISC projects, to work towards a collaborative approach to collection management.

The WHELF C/M Group may have started as a necessary part of a procurement process but it has evolved. It is a community: a support network, with aspirations, high standards, ambitious goals and an exciting future.

Helen Griffiths, Library Cataloguer, Royal Welsh College of Music and Drama

7. Staniforth, A and Dawson, A. WHELF Groups / Metadata: The aims of the WHELF Cataloguing Group. http://whelf.ac.uk/whelf-sub-groups/metadata/   [accessed 31 August 2020]

Mercian Metadata Group

Richard Birley, Library Supervisor (Cataloguing), Birmingham City University & Will Peaden, Information Resources Specialists, Aston University

In an age of austerity, where, at least in the area of metadata management, lone working is becoming the norm, collaboration really is the only way to get anything done. And it was on this basis that colleagues from Aston and Birmingham City Universities decided at the 2018 CIG conference to form a metadata special interest group within the Mercian Collaboration (MC) with the aim of providing training and promoting standards within our region. Like similar collaborations across the UK MC is a professional network focussed on providing training and CPD opportunities for its 23 members spread across the east and west Midlands (see: https://merciancollaboration.org.uk/).

We began in earnest in February 2019 with a planning meeting at Birmingham City University with 17 delegates representing 15 institutions attending. Fortunately, there was full agreement amongst those present with our proposal and suggestions for future activity were made and a Mercian JISC mailing list was created. This gave us a mandate to formally propose the creation of the group to the MC's Directors at a meeting in March 2019, where the group was officially welcomed as a new Special Interest Group. Being 'official' meant we could benefit from MC's support and apply for funding for events.

Since then we have held a number of events:

- The future of cataloguing – Aston University 20/8/19 – this event was to showcase the group within the region and identify key concerns of future/potential participants so that we could prepare future events/ activity. It was based on similar 'world café' style event held in Edinburgh in June 2019 with the only difference being that we reduced the number of discussion topics from six to four. We were fortunate enough to be able to book Thurstan Young from the BL to give us an update on recent developments re standards and he also chaired one of the discussion 'tables' with the others being chaired by committee members. We were also fortunate to be joined by members of the WHELF consortium and MDG members from London both of whom wanted to repeat a similar meeting in their own regions. It was an excellent example of collaboration in practice.

- Legacy metadata e-forum – on our discussion board 30/10/19 (see: https://mercianmetadatagroup.createaforum.com/).

- RDA Orientation workshop (co-badged with CIG/MDG & UK RDA Committee) – Birmingham City University 11/12/19 – this wasn't a MMG event but by co-badging with MDG & UK RDA Committee we were able to provide a free venue so that they could bring a valuable meeting with great speakers from the BL and UK RDA Committee to the region that otherwise may not have happened. It also reduced costs for Mercian participants who didn't have to factor in the inevitable expensive peak return to London to their attendance costs.

- AGM – Leicester University 22/1/20 – we should stress this wasn't just an administrative meeting. We feel it's really important to elicit feedback to gauge where the group is and what its members require from it. We can then plan future events that participants want to attend. We feel that groups like this need to be, whenever possible, 'led' by their members.

- Shelf-ready metadata e-forum – on our discussion board 19/8/20 (see: https://mercianmetadatagroup.createaforum.com/).

Overall, the experience has been a positive one. We have fulfilled our aims and have begun to meet and collaborate with like-minded colleagues across our region. National organisations play an important role within our community but can't do everything. Collaborations like ours can create local communities of practice that can feed in to the 'national conversation' about metadata while offering peer to peer support. We feel that the MDG has achieved this in its own small way.

Going forward, the MDG's 2020 conference provided us with plenty of ideas for future activity, particularly around the questions of ethics and advocacy. As was illustrated by a number of talks, local collaborations have the potential to influence the creation and quality of metadata through their involvement with local consortia. This is something we would like to pursue in the coming months.

Richard Birley, Library Supervisor (Cataloguing),
Birmingham City University

Northern Collaboration: Developing a Metadata/Linked Data Technical Group; a sub stream of Content SIG and creating a community of practice

Kathryn Sullivan, Discovery Manager, University of Manchester Library

The Northern Collaboration (NC) is a consortium of 29 higher education libraries in the north of England, its aim is to provide a framework within which libraries can work together to improve the quality of services. NC seeks to stimulate and explore new business models for efficiency against a backdrop of rapid change in higher education and information and technology industries. NC is also a means of exchanging ideas and good practice, raising awareness among the staff of member libraries of changes in the external environment and making connections between librarians and related professional groups. NC activities include Special Interest groups SIGs which are formed to share best practice and can lead to the formation of a project strand with a specific end-result; groups are encouraged to organise subject-relevant Learning Exchanges, which are open to the wider NC community. One such well-established SIG is the Content group, which has a remit of sharing information and experiences about the management of resources; it was from here that the impetus for a metadata related group was first formed.

During the preparation for the National Framework Agreement, questions relating to metadata quality within the content purchasing supply chain came to a head. In order to contribute to the debate, NC Content SIG supported by National Acquisition Group NAG (also represented in Content group) flagged the necessity to include metadata expertise in order to contribute fully to this review of the framework agreement. At the same time JISC kick started Plan M involving many different stakeholders across the library community in wide-ranging discussion relating to metadata. Its remit: to rethink the way that metadata for academic and specialist libraries is created, sold, licensed, shared and re-used in the UK. Following the Plan M task and finish group discussions NAG was seeking a metadata representative to join its committee in preparation for the National Framework Agreement and subsequently approached Emma Booth University of Manchester Library E Resource Metadata Specialist. By joining NAG Emma tapped into the range of metadata practices across institutions affected by Southern Universities Purchasing Consortium SUPC, she creating the NAG Quality of Shelf Ready Survey (2020) gathering data and seeking consensus in support of the National Framework agreement.

During this time I met with Julie Cleverley of Leeds Beckett University and chair of the NC Content Group to tap into these initiatives and consider the viability of creating a sub strand SIG as a community of metadata practice to test the appetite for the formation of a metadata collaborative group for NC. A call for interest was subsequently circulated via the Content SIG forum advising purchasing colleagues to contact their relevant metadata person in their institution to ensure metadata representation. Riding the wave and taking advantage of the current enthusiasm for metadata we used the momentum of the Future of Cataloguing event in Edinburgh June 2019 as a launch pad to test the level of support for a collaborative group in the north of England. On 21 June 2019 we held a World Café event at Leeds Beckett, inviting Richard Light to talk through RDA basics and Alan Danskin to follow up the talk given previously on Linked Data and Metadata at the British Library.

Our fact finding at this time centred on the core questions: Who are we (what is our remit), Where are we currently and what are we doing with linked data?, Where do we want to go and why?, and What are the barriers to getting there? Following this first event the Metadata/Linked Data Technical Group was born. The name and remit reflect the desire to consider metadata as an asset which requires careful curation, protecting its legacy at the same time as future proofing its transition to new standards and reflecting its growing technical nature. The group to date is made up of 20 people representing 17 northern institutions/Universities and has met 4 times following its creation in 2019.

Our vision remains "metadata is an institutional asset which needs to be fit for discovery today and in the future". Our remit is helping institutions stabilise their metadata practices for the future, advocating for consistent quality metadata available in the acquisition supply chain and sharing best practice to capitalise on developments relating to linked data.

One of the most important aspects of creating this group has been its relevancy by ensuring the topics are relatable to encourage discussion and collaboration. We therefore linked our discussions to investigating three main threads relating to metadata legacy, quality, and standards. How do we stabilise metadata and adopt consistent long-term practice, can we agree on a standard quality MARC record and what is the progress implementation Resource Description and Access RDA standard across the group?

The most interesting aspect has been to wealth of information captured and shared within the group (enabled via [Google Drive)](), the sheer enthusiasm of those who joined and attended the group discussions and the passion for quality of metadata fit for purpose. One startling aspect has been the amount of rework and duplication of effort in evidence across the NC including the range of practice maybe due to LMS, size of institution or legacy practice. One such topic centred on whether it is better to remove metadata from records versus configuring the discovery interface to suppress from display. The importance of future proofing metadata is key, considering the impact of its transition within systems, of integrating new standards and preparing ourselves for linked data where we can. So far there has been a comforting undertone of agreement for systematic solutions, advocacy with LMS providers and consistent practice and NC Metadata/Linked Data Technical Group is responsible for enabling this. As well as providing a collaborative network the group so far has shared examples of quality MARC records and RDA templates and considered MarcEdit applications providing opportunities to share best practice.

Bringing the practitioners (sometimes overlooked) into the national discussions and developments can only strengthen a common approach to the difficulties encountered manipulating vast amounts of metadata. We can now look together to the implementation of LibraryHub Cataloguing, Discovery and Compare as a rationale for sharing best practice and working to improve the infrastructure which supports what we all do independently within our institutions.

The impact of the group has been to provide a regional voice for metadata and tapping into the development of a community of metadata good practice ensuring metadata has a tangible voice. Its future therefore lies with the need for regional practitioner collaboration which link into a national professional voice. As it stands to date, we now have a range of regional collaborations including, Northern, Mercian, WHELF and the newly established Southern. The future of the group lies with the development of a collaborative community of practice for metadata professional working far and wide, independently or within teams. MDG now luckily includes representatives from all these regional groups on its committee, this will need to be maintained for these relationships to continue. At the MDG conference in September this year the regional groups considered options for the regional metadata groups to convene, share some best practice, and maybe identify some activities that could be happening regionally but with some national coordination. Tying this in to CILIP MDG in some way seems to be the favoured option to glue things together. This could include training requirements such as for non-conceptual RDA, MARC Edit with opportunities to work with Linked data - maybe through Wikidata - watch this space.

Kathryn Sullivan
Discovery Manager - University of Manchester

It's probably sensible to start by explaining how a metadata special interest group spawned from a purchasing consortium. I made the jump from Library Services at Imperial College London to the world of procurement with the Southern Universities Purchasing Consortium (SUPC) in January 2020. SUPC is a membership-based procurement organisation that provides value for money frameworks, and support and advice services to universities. With our sister divisions, SUMS Consulting and the Procurement Shared Service, we support best practice development across the UK. My background is mainly in library acquisitions but at one point in the dim and distant past I was a cataloguer so, while not a current expert, the importance of metadata is something that I understand quite well.

I quickly started to strengthen the strategic use of metadata within SUPC activities. The effective use of metadata supports our aims of providing value for money and a positive student experience via our Books/e-books framework agreement, which covers supply to institutions in England and Wales. I had already recruited Jenny May, Metadata Services Coordinator at Imperial College London to act as my metadata advisor and we were keen to position SUPC as a partner within the metadata community. This approach has really paid off because my work touches on lots of areas such as Open Access and accessibility, and I've found that metadata always seems to have something valuable to offer.

The recent formation of regional metadata groups is something I was aware of but I had not considered the existence of such a group in the south let alone forming one. That came about following a tweet by CILIP MDG in January trying to prod someone (anyone!) into doing something. I suppose I was open to being prodded!

The 'missing' regional group equated pretty well with the territory covered by SUPC and the London Universities Purchasing Consortium (with whom we have a strategic partnership) so I reached out to some of the metadata managers I know to gauge interest. Unsurprisingly, I found a wealth of enthusiasm.

2020, of course, has been a very difficult year. We had started to scope out the group and look to the other regional groups for inspiration when lockdown started. Though this initially hampered progress, we decided to launch the group during May in the format of an informal coffee morning. Primarily, we wanted to take the opportunity to provide a forum where fellow metadata professionals could share experience during what has been a difficult time. We have since attracted nearly 70 individuals representing 45 organisations.

Our meetings, while informal and allowing room for ad hoc discussion, are collaborative with a focus on current challenges and best practice. Recent topics have included the NAG shelf-ready metadata report, bias within classification and subject headings, and possible approaches to metadata KPIs in the next Books/e-books framework agreement.

Having started the group under lockdown the biggest benefit has really been around having a network of peers to exchange experience and opinion with. The specialist nature of metadata can leave some members a little isolated within their institutions and with everyone also stuck at home we wanted to provide an outlet that members could shape according to their own needs.

From the SUPC perspective, being a part of this group is ensuring that our organisation pursues the most important work streams on behalf of our members. I have enough metadata DNA to follow the discussion and therefore spot potential pitfalls in what might at first seem to me like a good idea.

I've found the ethical discussions particularly helpful and the accumulated expertise and experience is helping to shape the areas where Jenny and I will invest our time.

We would like the group to mirror other regions as an avenue for professional development and support for metadata professionals. We have had some initial discussion about what we might achieve working remotely but lockdown workloads have prevented this from bearing fruit so far. I believe the group will be able to facilitate such events more easily as we'll be able to act as a focal point for the south in terms of both ascertaining the needs of members and delivering events.

So what do I see in the future for this group? I think we can provide opportunities to individuals via membership of an organising committee. This was a key element of my own professional development and a number of individuals have already expressed interest. I hope a chair will come forward as we formalise so that the group is driven by appropriate expertise.

Of course, the key purpose of the group is to identify and deliver professional development opportunities. We have started to work with other metadata groups to identify where gaps exist and events will naturally follow.

Gavin Phillips, Category Manager: Academic Services, SUPC

Determinants of challenges associated with performance appraisal system used for assessing cataloguers in university libraries in Nigeria

Zainab Abba Haliru (Bauchi State University), Victoria Sokari (Bayero University), Ibrahim Wada (University of Maiduguri)

Abstract

The main objective of this study was to investigate the determinants of challenges associated with performance appraisal systems used for assessing cataloguers in Nigerian university libraries. A quantitative research method was employed using a cross sectional research design. The study population comprised all the one hundred and seventy-four (174) heads of cataloguing units in all the universities (including federal, state and private) across Nigeria. The total enumeration method was used to include all 174 heads of cataloguing in the population of the study. A semi-structured questionnaire was used to collect data for the study. The questionnaires was produced on Google form and distributed through social media (Linkedin, Whatsapp, Telegram) and e-mail to the respondents. A total of 171 librarians responded with a response rate of 98%. Collected data was analysed using descriptive statistics with frequencies and percentages computed in tables. Findings of the study revealed that: some of the challenges associated with the performance appraisal system used for assessing cataloguers included, subjectivity and bias, time consuming, inconsistent results, no true test for cataloguers peculiar knowledge, skills and attitude among others; the appraisals for cataloguers should include job requirement areas that are specific to cataloguing, encapsulating the nitty-gritty of knowledge, skills and attitude/behavioral aspects as opposed to the current appraisal which contains mostly general attitudinal/ behavioral aspects. The study recommends that: the components of the performance appraisals for assessing cataloguers should cover detailed aspects peculiar to cataloguing job roles/functions; a more scientific appraisal system (such as technologically driven software) that will ensure a more objective and effective assessment of cataloguers should be developed.

Keywords: Challenges, Performance appraisal, Cataloguers Assessment, University Libraries

Introduction

Performance appraisal as a means to manage organisations appears to be enjoying much attention from academics and practitioners, both in the public and private sector in recent years. Performance appraisal is an inevitable and universal responsibility of the human resource development department of every organisation. According to Ogunlana & Oshinaike (2016) performance appraisal assesses an individual's performance against previously agreed work objectives. It serves two functions: it enables management to evaluate an individual's performance in the current job to identify strengths and overcome weaknesses; and it provides information to assist management plan postings, transfers and promotions. In doing so, management is able to compare performance and potential between officers of the same rank.

Performance appraisal should extend individuals' capacities and utilise their maximum capabilities so that there is improved personal performance and relationships; increased job satisfaction to determine motivation; and improved quality of life (Bateman & Snell, 2011). In the absence of a carefully structured system of appraisal, people will tend to judge the work performance of others, including subordinates in an informal and arbitrary way. An efficient performance appraisal must therefore be a systematic review of an individual employee's performance on the job that is used to evaluate the work effectiveness. Performance appraisal must seek to evaluate and re-evaluate the performance of employees in order to enable them to realise their full potential (Armstrong, 2008).

In the university library domain, the evaluation of employee performance is now an increasingly important aspect of performance management procedures. The measurement of units of production and activity has progressed from the measurement of outputs (formation) to the measurement of outcomes (summation) (Van Thiel and Leeuw, 2002; de Vries, 2010).

The university library performance management framework is characterized by the role of employee performance in accomplishing its goal, which is primarily to support teaching and learning activities by providing information resources and services to the academic community, through a systematic procedure involving the selection, acquisition, organisation, preservation and dissemination of information. Empirical studies abound in human resource management from all sectors including librarianship that attribute effective performance appraisals to many important work outcomes, such as improved employee productivity, innovativeness, competency, identifying employee strengths and weaknesses, job satisfaction, commitment and motivation (Curzi, Fabbri, Scapolan, & Boscolo, 2019; Okoye, Mbagwu, Abanum & Nwaohiri, 2019; Idowu, 2017; Agyen- Gyasi & Boateng, 2015; Ikonne, 2015).

Preliminary investigations and information gathered from literature revealed that the appraisal system used in Nigerian University libraries is the Annual Performance Appraisal (APA). The contents of the APA is predominated mostly by behavioral/attitudinal attributes, giving less emphasis to the specific functional, professional knowledge and skills areas, thereby making it too generic. When the technical nature of cataloguing work, which sets it apart from other departments within the library system is considered, one could, without equivocation argue that the general purpose annual appraisal system cannot effectively disclose specifics of knowledge, skills and attitudes possessed by cataloguers, that should allow them to be fit to perform their job functions on one hand and allow room for improvement on the other. Consequently, the general view among cataloguers in the academic libraries is that the appraisal method does not reflect the true measure of individual performance based on the job roles/description being performed (Ikonne, 2015; Agyen-Gyasi and Boateng (2015).

Furthermore, in Nigeria, there seem to be paucity of studies on the problems of the performance appraisal method used on cataloguers in the university libraries. Little is currently known about the micro-analytical approach to cataloguer performance as it affects the macro-strategic approach to organisational performance in Nigerian university libraries. The focus of this study therefore, is to investigate the challenges associated with the appraisal system used for cataloguer performance assessment in Nigerian universities libraries with particular emphasis on the views of the cataloguers on the specific job requirements that should be contained in the instruments for their appraisals.

Statement of the problem

Cataloguers working in Nigerian university libraries hold a most vital position in providing effective description and proper placement of the information contents. They are charged with the responsibility of mitigating the disarray that would have occurred if information resources were not organised. As such they are expected to continuously strive to re-tool re-skill and upgrade competencies to be consistent in the pursuit of professional development and competitive edge (Olayemi & Olayemi, 2019). This is because their work environment is dynamic, wide-ranged and in a constant state of change precipitated by the ever evolving nature of information with the advent of the new technologies to library operations (CILIP, 2020). Thus, it becomes pertinent that cataloguers are continually subjected to assessment by way of appraising their job performance on a regular basis in order to keep developing their skills.

Performance appraisal has been linked to organisations' success as concerns pertaining to the concept are on the increase in university library management circles all over the world (Kanik, 2011). Performance Appraisal in Nigeria is usually done using the APA system. Bearing in mind that one important outcome of performance appraisal is the detection of specific areas of strength and weakness in employees, one can argue that the pursuit of professional development and competitive edge must begin at this point. This can better be achieved when the appraisal is based on specific descriptions of the jobs performed by workers rather than a more general appraisal system.

In Nigeria, university libraries in general and cataloguing department in particular often face challenges on how they can best measure and evaluate the skills, abilities, knowledge and experiences of librarians/ cataloguers, particularly when the appraisal exercise does not often reflect the actual work (i.e. the job descriptions) in the unit.

This emanates from the use of APA. The APA has been criticized by Prentice in Okpe (2012) as providing a general assessment that does not address the peculiarities and differences in the activities of the different units in the library.

Furthermore, most of the studies conducted in the area of performance appraisal in Nigeria focused on librarians in general (Okoye, Mbagwu, Abanum & Nwaohiri, 2019; Idowu, 2017; Ikonne, 2015; Okpe, 2012). There is a dearth of studies on performance appraisal as it concerns cataloguers owing to the fact that appraisal can be best achieved when staff are assessed based on the specifics of their job roles. Discussions with heads of cataloguing departments agrees with the findings of **Njoku (2019**) that there is one standard performance appraisal instrument used for the entire library staff, which is developed by the Human Resource Development Departments and therefore too generic in nature to cater for the specific appraisal needs of the various units. It is against this background that this study aims at investigating the determinants of challenges associated with the appraisal methods used with emphasis on identifying specific areas of cataloguing job functions that should be included in the appraisal instruments for cataloguers in Nigerian university libraries.

Objectives of the study

The research objectives for the study are as follows:

1. To identify the challenges associated with the performance appraisal systems used for assessing cataloguers in university libraries in Nigeria.

2. To identify the specific job requirement areas that should be included in the appraisals for cataloguers in libraries under study.

Review of related literature

Determinants of challenges associated with the performance appraisal system used for assessing cataloguers

Performance is usually an ongoing process in libraries. Performance assessment in the library usually starts from the point of University Librarian whose major role is to link the goals of the library to the strategic objectives of the parent institution (Schachter, 2004). One major determinant challenge of the appraisal system used for cataloguers in Nigeria is that it is general in nature and does not reflect the specific job roles performed (Okpe's, 2012). This suggests that the cataloguer competence is never really measured, since the appraisal does not truly test for cataloguers' knowledge, skills and attitudes nor provide feedback to point out areas of strengths and weaknesses in order to encourage continuous learning that will lead to improvement on the job and create the capacity for mentorship. To buttress the view, many scholars (for example; Grote, 2002; Okpe, 2012; Ikonne, 2015; Idowu, 2017; Okoye, Mbagwu Abanum, & Nwaohiri, 2019) agree that annual performance appraisal used in most organisations including university libraries have always been considered problematic and an unwanted management task. It can therefore be inferred that the appraisals do not measure individual workers knowledge, skills, behaviours and traits; not to talk of the job roles actually performed.

According to Prentice in Okpe (2012) "*the appraisal system is a general assessment that does not address the peculiarities and differences in the activities of the different units in the library*". When the technical nature of cataloguing work, which sets it apart from other departments within the library system is considered, one could, without equivocation argue that the general-purpose annual appraisal system cannot effectively disclose specifics of knowledge, skills and attitudes possessed by cataloguers. This is evidenced in Cintrón and Flaniken's (2011) study that provides a detailed look at a population of 108 colleges and universities. Dissatisfaction was found with the appraisal process due to (a) lack of leadership support, (b) supervisors not being held accountable for the timely completion of appraisals, and (c) the lack of training provided to supervisors to conduct performance appraisals well.

The current appraisal methods have not resulted in a significant improvement in the overall performance or productivity of the library employees and cataloguers in particular. Thus, the annual performance appraisal system in Nigeria can be said to be ineffective. Most of the studies done on the challenges of appraisal systems in Nigeria were on the library generally and also did not cover the entire university system in terms of scope. This study thus, filled that gap to determine the challenges of performance appraisal used specifically for cataloguers in Nigerian university libraries including the federal, state and private.

Job requirements/areas for appraising cataloguers in libraries

The job requirement areas that should be appraised in cataloguers are broadly categorized into three namely: knowledge; skills and; attitude (Association for Library Collections and Technical Services, 2017; Kyndt & Baert, 2015; Soutter, 2013; Singer & Griffiths, 2010). Knowledge areas include professional aspects such as cataloguing, classification, indexing, abstracting and subject analysis. This can further be broken down into cataloguers knowledge of: cataloguing standards like AACR2, RDA; cataloguing tools like classification structures and schemes, subject heading lists; cataloguing principles like Ranganathan's laws of librarians, principles of authority control, principles behind controlled vocabularies; systems and technology in library management like knowledge of: indexing techniques and database structures, various approaches for metadata creation and library management systems, data standardization i.e. content, structure, data encoding format and exchange and conceptual models for library data like FRBR, FRAD, RDF; structure standards like MARC and Dublin Core; subject analysis procedures (ALCTS, 2017).

In a different view, the Federal Library and Information Center Committee (FLICC) (2011) stated that cataloguers and metadata practitioners (as they are called these days) are expected to be conversant and demonstrate knowledge of: established local, national and international standards and protocols to catalog and classify library materials and resources; established local, national and international standards and protocols for metadata and/or other content structuring systems; tagging to incorporate customer input into library content management structures and; new developments in content organisation and structure. Inferably, understanding those standards would expose cataloguers to the world of digital cataloguing environment and help them appreciate the enormous changes and advancements that accompany it.

Skill areas include professional skills and technological skills. Professional skills comprise cataloguers' ability to catalog, classify, index, abstract, perform subject analysis and other related tasks. Cataloguers have to master cataloguing principles and be skilled in the application of conceptual frameworks, standards and principles used by the library. For example, they have to be skilled in: the use of RDA and AACR2 in the formulation of a consistent cataloguing data and authorized catalogue entries; applying universal standards to local needs; cataloguing and classifying materials using DDC, LC accurately; indexing information; using lists of subject heading like the LC and Sear's lists and; analyzing information contents. Technological skills include cataloguers' ability to apply ICTs and other related cataloguing tools in the conduct of their work (Sokari, Gama, Haliru, Olayemi & Yemi-Peters, 2017). This entails their ability to: use MARC, HTML, XML and metadata schemas like Dublin Core and similar schema; manipulate OPACs; adapt models such as FRBR, RDF and FRAD to library data; use bibliographic databases, library management systems and institutional repositories; create, analyse, edit, evaluate and transform metadata; encode machine readable data and convert records from one metadata schema to another; search internet and database; design web pages; use OCLC bibliographic formats and standards; use Library of Congress-Program for Cooperative Cataloguing Policy Statements (LC-PCC PSs); use Library of Congress Name Authorities; use CONSER Cataloguing Manual (for Serials) (Sung, 2013).

Attitude is demonstrated as functional and behavioral skills that differentiates a superior performer from others. Functional skills include cataloguers' ability to apply consistency, flexibility, judgment, and adaptation in the process of performing their jobs, while behavioral skills include areas such as ability to communicate, meta competence (ability to learn and re-learn), punctuality, capacity to work under pressure, soberness, adherence to rules, sense of urgency, initiative, commitment to duty, neatness and appearance, integrity and trustworthiness, ability to learn quickly, ability to comply with lawful instructions, relationship with public & colleagues, dependability, attitude to work, efficiency and productivity.

Cataloguers can be appraised based on specialized knowledge and skills they possess (from a combination of schooling and working experience) as well as attitudes that are specifically attributed to cataloguing and related tasks (classification, indexing, abstracting). As such, all the job requirement areas earlier mentioned should be included in the appraisal system of cataloguers in order to justify their appraisal process and; provide opportunity for self-management that would result in a continual improvement on the job and; provide capacity for mentorship.

Research methodology

Quantitative research method was employed for the study. The survey research design was considered most appropriate because the design was suitable for collecting cross-sectional data as it is the case for this study. The study population comprised all the one hundred and seventy-four (174) heads of cataloguing units in all the universities (including federal, state and private) across Nigeria. The heads of cataloguing units were chosen because they were likely to be most conversant with the appraisal of subordinate cataloguers and how they could benefit from the study. Census/total enumeration method was used to include all 174 heads of cataloguing in the population of the study, since it was a manageable size. Also, adopting the census method ensured a well representative nature of the population and enabled the objectives of the study to be attained. The researchers were able to make generalisations with regards to the findings of the study. A semi-structured questionnaire was used to collect data for the study (data collection instrument). The questionnaires were produced on Google forms and were distributed through the social media (Linkedin, WhatsApp, Telegram) and e-mail to the respondents. The data was collected on-line for several reasons: reduced cost in terms of logistics; it eliminated problems associated with geographical boundaries and; provided higher response rates. A total of 171 librarians responded with a response rate of 98%. Collected data was analysed using descriptive statistics with frequencies and percentages computed in tables.

Data presentation and analysis

Table 1: Challenges associated with performance appraisal system used for assessing cataloguers in University libraries, Nigeria

Table 1 [see overleaf] shows that majority 170 (99.4%) of respondents agreed that the appraisal system in use for cataloguers does not truly test for peculiar cataloguer knowledge and does not provide capacity for mentoring/mentorship. This is followed by 169 (98.8%) as reflected by the responses on the appraisal system being overly subjective and prone to appraiser biases; does not show the relationship between cataloguer competence and work performance; and does not encourage continuous learning. The least responses were 141 (82.5%) and 144 (84.2) where the respondents agreed that the appraisal system was time consuming and does not provide feedback to the cataloguers respectively.

Table 1: Challenges associated with performance appraisal system used for assessing cataloguers in University libraries, Nigeria

Variables	Freq.	(%)
It is overly subjective and prone to appraiser biases	169	98.8
It is time consuming	141	82.5
Results are often inconsistent & unreliable	155	90.6
It does not truly test for peculiar cataloguer knowledge	170	99.4
It does not truly test for peculiar cataloguer skills and capabilities	164	95.9
It does not truly test for peculiar cataloguer attitudes	158	92.4
It does not show the relationship between cataloguer competence and work performance	169	98.8
It does not encourage continuous learning	169	98.8
It does not provide feedback to the cataloguers	144	84.2
It does not identify areas of strengths and weaknesses of cataloguers	168	98.2
It does not show cataloguers productivity ratings/levels	165	96.5
It does not provide capacity for mentoring/mentorship	170	99.4

Table 2: Specific job requirements that should be included in the appraisals for cataloguers in libraries under study

Variables	Freq.	%
Knowledge Areas		
Knowledge of cataloguing standards like AACR2, RDA	170	99.4
Knowledge of cataloguing tools (like classification structures and schemes, subject heading lists)	167	97.7
Knowledge of cataloguing principles like Ranganathan's laws of librarians, principles of authority control, principles behind controlled vocabularies	170	99.4
Knowledge of systems and technology in library management like indexing techniques and database structures; various approaches for metadata creation; library management systems; data standardization i.e. content, structure, data encoding format and exchange and conceptual models for library data FRBR, FRAD, RDF	161	94.2
Knowledge of structure standards like MARC and Dublin Core	154	90.1
Knowledge of subject analysis procedures	163	95.3
Knowledge of established local, national and international standards and protocols to catalog and classify library materials and resources	149	87.1
Knowledge of established local, national and international standards and protocols for metadata and/or other content structuring systems	147	86.0
Knowledge of new developments in content organisation and structure	168	98.2
Skills areas		
Ability to catalog, classify, index, abstract and perform subject analysis	171	100.0
Ability to apply conceptual frameworks, standards and principles used for cataloguing such as RDA and AACR2 in the formulation of a consistent cataloguing data and authorized catalogue entries	165	96.5
Ability to apply universal standards to local needs	166	97.1
Ability to catalog and classify materials using DDC, LC accurately	170	99.4
Ability to index information	165	96.5
Ability to use lists of subject heading like the LC and Sear's lists	166	97.1
Ability to analyze information contents	169	98.8
Ability to apply ICTs and other related cataloguing tools in the conduct work	170	99.4
Ability to use MARC, HTML, XML and metadata schemas like Dublin Core and similar schema	161	94.2
Ability to manipulate OPACs	166	97.1
Ability to adapt models such as FRBR, RDF and FRAD to library data	165	96.5
Ability to use bibliographic databases, library management systems and institutional repositories	166	97.1
Ability to create, analyse, edit, evaluate and transform metadata	142	83.0
Ability to encode machine readable data and convert records from one metadata schema to another	158	92.4
Ability to search internet and database	167	97.7
Ability to design web pages	133	77.8
Ability to use online cataloguing tools such as LC online, OCLC and classification web	167	97.7
Ability to use Library of Congress-Program for Cooperative Cataloguing Policy Statements (LC-PCC PSs)	155	90.6
Ability to use CONSER Cataloguing Manual for Serials	159	93.0
Attitude areas		
Ability to apply functional skills such as consistency, flexibility, judgment, and adaptation	170	99.4
Ability to apply behavioral skills such as communication, meta competence punctuality, work under pressure, soberness, adhere to rules, sense of urgency, initiative, commit to duty, integrity and trustworthiness, learn quickly, comply with lawful instructions, relate with public & colleagues, dependability, positive attitude to work, efficient and productive.	168	98.2

In area of knowledge areas, table 2 shows that majority of respondents 170 (99.4%) agreed that knowledge of cataloguing principles like Ranganathan's laws of librarians and knowledge of cataloguing standards like AACR2, RDA should be included in the appraisal assessment system. This is followed by 168 (98.2%) that is Knowledge of new developments in content organisation and structure. In areas of skills, the most response 171 (100.0%) went for ability to catalog, classify, index, abstract and perform subject analysis while 170 (98.4%) went for ability to apply ICTs and other related cataloguing tools in the conduct work and ability to catalog and classify materials using DDC, LC respectively. Respondents also agreed that functional skills 170 (99.4%) and behavioral skills 168 (98.2%) should be included in appraisal for cataloguers.

Discussion of findings

Findings revealed that appraisal system for cataloguers is bedeviled with following challenges: no true test for peculiar cataloguers' knowledge, skills and attitude; lack of capacity for mentoring/mentorship; overly subjective and prone to appraiser biases; does not show the relationship between cataloguer competence and work performance; does not encourage continuous learning; it is time consuming and; does not provide feedback to the cataloguers. This is in line with other studies that agreed that the current performance appraisal systems used for the cataloguers are incompatible with precepts and demands of providing adequate assessment of employees based on their specific performance in job roles (Okpe, 2012; Ikonne, 2015; Idowu, 2017; Okoye, Mbagwu, Abanum, & Nwaohiri, 2019).

Appraisals are supposed to serve as basis for transforming behaviors towards more improved and productive work habits, providing the foundations for evidence-based decision making, where it concerns staff development. Many researches on performance appraisal are of the opinion that most performance appraisal systems in use do not augur well for employee growth in the workplace. In a similar vein, Grint (2007) in the critique of performance appraisal points out that "*its subjectivity – leads to a fruitless search for ever more objective appraisal criteria that is illusory. The consequence need not be that appraisals should be abandoned but they should be treated with much more skepticism and reflexivity*". The appraisal method for assessing cataloguers in Nigeria university libraries should therefore, encapsulate all that is required in order to provide for a holistic and in-depth appraisal owing to the important function/role that cataloguers perform within the larger library setting.

Regarding the identification of specific job requirement areas that should be included in the appraisals for cataloguers, the majority of the respondents agreed that appraisals should include the nitty-gritty of knowledge, skills and attitude/behavioral aspects of cataloguing, such as: knowledge of cataloguing principles like Ranganathan's laws of librarians; knowledge of cataloguing standards like AACR2, RDA; knowledge of new developments in content organization structure; ability to catalogue, classify, index, abstract and perform subject analysis; ability to apply ICTs and other related cataloguing tools; ability to catalogue and classify materials using DDC and LC. This is opposed to the current appraisal which contains mostly general attitudinal/behavioral aspects. Scholars agreed that appraisals for cataloguers should be done based on areas of knowledge, skills and attitude all of which comprise series of cataloguing activities that culminates to mould up a better cataloguer (Association for Library Collections and Technical Services, 2017; Kyndt & Baert, 2015; Sortter, 2013; Singer & Griffiths, 2010).

Conclusion

The need for continuous learning in the workplace is now at the heart of human resource management thus, establishing a foundation for new philosophies in employee assessment that directly/indirectly serves as a basis for re-evaluating employee performance appraisal becomes pertinent. To put it succinctly, among other issues, the finding reveals that the present performance appraisal from the perspective of cataloguer does not match skill sets with specific job roles. From these results, it can therefore, be inferred that the appraisal system does not satisfy its purpose and should be thoroughly improved upon to match with the required peculiarity and specificity of the cataloguing operationality.

Paramount among the aims of performance appraisal is to improve the cataloguers' performance – as a result of the appraisal, the management of the university library should get a better understanding of cataloguer strengths and weaknesses, which would in turn help in learning about areas where their cataloguing capacity could be improved; identify areas where cataloguers need training; enhance productivity; job satisfaction and motivation among the cataloguers and; build a formidable team that will ensure that cataloguing unit contributes in realising the goals of the library and that of the university at large.

Recommendations:

1. The components of the performance appraisals for assessing cataloguers should cover detailed aspects peculiar to cataloguing job roles/functions, apart from the general attitudinal/behavioral aspects contained in the current system in use. These details should include the areas of knowledge, skills and attitude that are specific to cataloguing functions. This is in order to justify the appraisal exercise and to obtain a more objective evaluation of cataloguers, which will result in a continual improvement on job performance and in grooming expert cataloguers over time in line with best practices.

2. A more scientific appraisal system that will ensure a more objective and effective assessment of cataloguers should be developed. This could be in form of a technologically driven system such as software to cater for that purpose

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Linked Data for the Perplexed Librarian by Scott Carlson, Cory Lampert, Darnelle Melvin, and Anne Washington provides a painless introduction to the concepts of linked data and the semantic web, aimed at library staff with little or no technical expertise. Its stated goal is to "present basic information about linked data in a clear, jargon-minimized way" (p. x). For the most part it succeeds in making linked data seem friendly and approachable, with just a few minor caveats.

The book begins with a brief history of the internet and the development of the semantic web, discussing the potential that linked data pioneers like Tim Berners-Lee envisioned and the extent to which it has (or has not) lived up to that potential. From there, the authors use a hypothetical collection of funk and soul vinyl records to illustrate how the information in and about those records can be expressed in ways that computers can interpret and analyse, and which can be enriched by linking to other published datasets. After a whistle-stop tour of some existing linked data projects like WikiData and VIAF, the book points the reader to tools like MarcEdit and OpenRefine which can be used to enhance existing data, and suggests a series of activities that libraries can undertake in preparation for creating their own linked data projects.

At a slim 164 pages, it is not a user's manual with specific instructions, but instead gently introduces the reader to what linked data is, the types of structures it relies on, and its potential for improving access to library and other cultural heritage collections. It explains much of the technological jargon surrounding BIBFRAME, RDF, SPARQL, and the like in simple terms, enabling the reader to extract more value from the plethora of conference papers, journal articles, and webinars that have been produced around the concept of linked data over the past decade or more. Although the absence of step-by-step guides may frustrate some readers, this focus on high-level concepts has the benefit of increasing the book's longevity. Where a more specific guide would become increasingly outdated with every new software update, these high-level concepts should remain applicable for the foreseeable future.

While the book does not dwell at length on specific encoding schemas, it does assume that readers have (or are willing to obtain from some other source) sufficient understanding of programming syntax to be able to interpret examples using SQL, JSON, and XML. Staff with no programming experience at all may wish to familiarise themselves with at least the basics of XML in order to get the most out of the middle chapters of this book.

Unlike some linked data evangelists, the authors offer a frank and honest assessment of the past and present barriers to wider application of linked data. The issue of legacy data is addressed indirectly through a discussion of MARC's history and shortcomings in the context of the semantic web. The real-world examples of linked data in chapter five are dominated by private corporations like Facebook and Google who are often reluctant to share the inner workings of their products. The activities in chapter seven emphasise the importance of having IT support, and the epilogue (aptly titled "The Unprovable Pudding") acknowledges that an absence of software developers in libraries has prevented many linked data experts from implementing their own research outcomes. While there is no neat and tidy solution to these problems, the authors hope that by equipping more librarians with the vocabulary and understanding to better articulate our technological needs and potential outcomes, the route toward implementing linked data in our everyday work will become clearer.

Bearing these caveats in mind, this book is nevertheless a good introduction to the big picture of what linked data is and how it has the potential to enhance the work already being done by libraries and other cultural heritage institutions. The language and examples are clear and easy to understand and give the reader the confidence to explore further on their own. It gives the reader a sense of the major landmarks in the linked data landscape, with the expectation that they will chart their own path and seek out additional skills and resources in accordance with their specific local needs.

This book is available from: http://www.ala.org/alcts/resources

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